

Procurement

Of course, good procurement is part of good stewardship. Making good use of the resources at our disposal is an essential part of being good stewards.

But funnily enough that isn't the first step.

Scoping

The first step is defining what you need. Really, really, need. And that means going back to purpose. In a building project as in many others, it is getting clarity of purpose or objective or mission that is the essential foundation of good procurement. Defining need is sometimes called defining scope or just scoping.

It is then much easier (even though it sometimes seems a bit of a shame) to decide later whether something is 'out of scope' (project-speak for 'unnecessary' or 'superfluous'). Good stewardship starts with defining the scope in a way which makes that discipline possible. But scoping is not a cold exercise, it also, crucially, includes the qualities of the good or service which is being sought.

Scoping people

To get to a design, even if you are going to produce it in-house, the same steps are required to define the need, the scope of the services you need or think you need, from people. In a building project there are several important people but the architect is a crucial one. You want to have someone who looks at your need and comes up with a solution – a design. So you want more than a set of drawings and a specification, you want a trusted team-member, a consultant, an adviser, a presenter, with suitable skills and experience.

Shortlisting

Once you have agreed that scope it becomes much easier to make a search for people, and go through a process of shortlisting, using the criteria you have defined in the scope, before inviting to the next stage.

Tendering

For people: the scope also provides the basis for the potential supplier to tender for work. They can respond to this scope document in making a presentation. This may take the form of a structured interview, with presentation, and proposals on pricing.

For works: this will be a much more formal process, against an ITT (invitation to tender) and detailed works specification.

Where projects are funded more than 50% from public funds (lottery or other public money) then they may be subject to an OJEU tendering process. Small lots - £62,842. Works - £785,530. If you or your architect are unsure about this then could consider using Parish Buying to advise or even to run a procurement tender for you.

Contracting

The nature of the contract will vary according to the services or works provided, and the degree of definition you can bring to the task. This is dealt with in a bit more detail below.