

AGENDA FOR STANDARDS COMMITTEE



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To: All Members of Standards Committee

Councillors : S Haroon (Chair), S Arif, A Booth, L Dean,
D Green, M Hayes, G Marsden, T Rafiq, I Rizvi and
M Whitby

Dear Member/Colleague

Standards Committee

You are invited to attend a meeting of the Standards Committee which will be held as follows:-

Date:	Tuesday, 15 November 2022
Place:	Council Chamber
Time:	6.00 pm
Briefing Facilities:	If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted.
Notes:	Training for Committee members only, commencing at 17.20 in the Council Chamber

AGENDA

1 APOLOGIES FOR ABSENCE

2 DECLARATIONS OF INTEREST

3 MINUTES AND ANY MATTERS ARISING *(Pages 3 - 6)*

The minutes from the meeting held on 1st March 2022 are attached.

4 LOCAL GOVERNMENT OMBUDSMAN REPORT *(Pages 7 - 14)*

The Council's Monitoring Officer will provide Members with a verbal update at the meeting, report attached.

5 CONTRACT PROCEDURE RULES *(Pages 15 - 92)*

A report from Sam Evans, Bury Council's Section 151 Officer is attached.

6 MEMBER ATTENDANCE STATISTICS *(Pages 93 - 96)*

A report from Democratic Services is attached.

7 MEMBER DEVELOPMENT HANDBOOK *(Pages 97 - 122)*

Attached, for comment is a draft Member Training Handbook.

8 BUDGET COUNCIL - DISPENSATION PROCESS

The Monitoring Officer will report at the meeting.

9 URGENT BUSINESS

To be agreed by the Chair.

Minutes of: **STANDARDS COMMITTEE**

Date of Meeting: 1 March 2022

Present: Councillor T Pickstone (in the Chair)
Councillors R Bernstein, S Butler, M Hayes, L Smith, M Whitby
and J Harris

Also in attendance: J Dennis, Director of Law and Governance
J Gallagher, Head of Democratic Services

Public Attendance: No members of the public were present at the meeting.

Apologies for Absence: Councillor T Rafiq

7 DECLARATIONS OF INTEREST

There were no declarations of interest.

8 MINUTES

The minutes of the meeting of the 15th November 2021 be approved.

9 COUNCILLOR COMPLAINTS UPDATE

The Council Monitoring Officer presented a report providing details of Elected Member complaints received by the Monitoring Officer for the period April 2021 – February 2022. The reports includes details of the outcome from the Standards Hearing which took place on 11 & 18th February 2021.

The number of complaints received by the Monitoring Officer in this period has been low. Member are asked to note that three complaints have been received within the last few weeks.

The Monitoring Officer reported that she is unable to identify any emerging themes from the complaints received.

Members discussed the sanctions available to the Standards sub committee once a breach is confirmed. Members expressed concerns that the ultimate sanction is for the electorate to decide, however with limited information in the public domain this is not always possible.

It was agreed That:

1. Members note the contents of the report
2. That Members direct the Monitoring Officer submit an annual report to the standards committee, the report will cover all aspects of governance arrangements.
3. Members note the revised Monitoring officer protocol sets out that complaints will be reported to the standards committee on an annual basis with the annual report.

10 CONSTITUTION REVIEW

The Council's constitution was reviewed and updated during the municipal year 2020/21. In considering the new Constitution, Members agreed that it would be reviewed annually to ensure that the changes proposed as a result of the review were fit for purpose.

Following agreement at Standards Committee and Council in November 2021

Members agreed a work programme for future review see Appendix 1.

The constitution stipulates that oversight of the Council Constitution is a function of the Standards Committee. However, there are particular elements of the Constitution that are pertinent to the work of the Standards Committee that are due for review, namely the Monitoring officer protocol

This protocol has been reviewed considering best practice guidance, current legislative framework and protocols in neighbouring Greater Manchester authorities.

It was agreed:

The Monitoring Officer Protocol would be forwarded to Annual Council with no amendments.

11 MEMBER TRAINING UPDATE

The report sets out all Member Training carried out during the municipal year 2021/22 and provides an overview of the plans for Member Induction following all-out elections in May 2022.

Members discussed the plan.

It was agreed;

The member induction plan would be updated to include a How to be a Councillor update.

12 MEMBER SAFETY GUIDANCE AND SOCIAL MEDIA POLICY

Following the death of the Member of Parliament David Amess, the Chief Executive requested a Member Safety group be established; the membership included – the Labour whip, Conservative whip, Mayor and Councillor Mason. The primary function of the Group was to review current safety guidance supported by the Monitoring Officer and Democratic Services; the group met on the 9th December 2021.

Following the member safety group meeting, a draft member safety guidance was circulated with the papers for this meeting. Meeting reviewed the guidance in conjunction with the social media policy.

It was agreed;

That the social media policy be updated to include advice as to what Councillors can do when they are being targeted online.

COUNCILLOR T PICKSTONE
Chair

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REPORT FOR DECISION



	STANDARDS COMMITTEE	
DATE:	15th November 2022	
SUBJECT:	LOCAL GOVERNMENT AND SOCIAL CARE OMBUDSMAN COMPLAINTS & OMBUDSMAN'S ANNUAL REVIEW LETTER 2022	
REPORT FROM:	DIRECTOR OF LAW & DEMOCRATIC SERVICES	
CONTACT OFFICER:	Michael Cunliffe, Democratic Services	
TYPE OF DECISION:	REPORT FOR INFORMATION	
FREEDOM OF INFORMATION/STATUS:	This paper is within the public domain	
SUMMARY:	This report sets out findings and recommendations of the Local Government and Social Care Ombudsman	
OPTIONS & RECOMMENDED OPTION	(a) That the content of the Ombudsman's Annual Review Letter to the Council be noted (b) That the complaints made to the Local Government Ombudsman referred to the Council during 2021/22 and their outcomes be noted	
Corporate Aims/Policy Framework:	Do the proposals accord with the Policy Framework but will need approval of Full Council. Yes	
Statement by the S151 Officer: Financial Implications and Risk Considerations:		
Health and Safety Implications	None	
Equality/Diversity implications:	There is no impact on equality matters as the report contains options for a discussion.	
Considered by Monitoring Officer:	Yes The legal implications are set out in the report. (There is a statutory duty for the Monitoring Officer to prepare a formal report to the Council	

	where there has been an act which constitutes maladministration or service failure; and where the Ombudsman has conducted an investigation into the matter).
Wards Affected:	All
Scrutiny Interest:	Overview and Scrutiny Committee

TRACKING/PROCESS**DIRECTOR: Deputy Chief Executive**

Chief Executive/ Strategic Leadership Team	Cabinet Member/Chair	Ward Members	Partners
26 th September 22			
Scrutiny Committee	Cabinet/Committee	Council	

1. INTRODUCTION

- 1.1. The Council receives an Annual Report summarising all complaints dealt with by the Local Government and Social Care Ombudsman ("LGO"). This Report provides a brief commentary on the Ombudsman's Annual Review letter. (Attached).

2. Ombudsman's Jurisdiction

- 2.1. The Local Government Act 1974 established the then Local Government Ombudsman for England and for Wales. The Act defines the main statutory functions:

- to investigate complaints against councils and some other authorities
- to investigate complaints about adult social care providers from people who arrange or fund their own adult social care
- to provide advice and guidance on good administrative practice

The main activity under Part III of the 1974 Act is the investigation of complaints, which it states is limited to complaints from members of the public alleging they have suffered injustice as a result of maladministration and/or service failure. The LGO jurisdiction under Part III covers all local authorities (excluding town and parish councils). The LGO changed its name to the Local Government and Social Care Ombudsman in 2017 to reflect the full scope of their jurisdiction

2.2 Complaints and Enquiries Received by the Ombudsman in 2021/22

- 2.2.1 The Ombudsman provided, statistics on how complaints upheld against the Council were remedied and those not pursued. This year's letter again includes a breakdown, showing the complaints and enquiries received and decisions made. The letter and data is attached as Appendix A. The number of complaints and enquiries received for 21/22 as compared 20/21 has increased but this is probably a result of a Covid hit year (20/21) with a similar total in comparison to 19/20 pre Covid:

2021/2022- 68
 2020/2021 - 38
 2019/2020 - 73
 2018/2019 - 67

2.2.2 In addition, it is clearly stated by the Ombudsman in the Annual Review Letter that these figures may not be reflective of the number of complaints made to the Council.

2.2.3 The complaints received by the Ombudsman about the Council in 2021/22 were split across services as follows (note these are LGO designated service categories, see Appendix B). These are compared with last year's figures:

Service Number of Complaints	2020/21	2021/22
Adult Care Services	6	4
Corporate & Other Services	1	2
Education & Children's Services	9	24*
Environmental & Public Protection & Reg	6	11
Highways & Transport	6	10
Planning & Development	0	4
Housing	2	2
Benefits and Tax	4	9
Other	1	2

2.3 Ombudsman Complaint Decisions

Decision of Ombudsman in 2019/20	2020/21	2021/22
Investigated – Upheld	6	11
Investigated – Not Upheld	10	4

2.3.1 Appendix C to this report provides details of the 11 decisions upheld and the required actions by the Council to remedy these. The decision of "Upheld" is applied when the Ombudsman finds there is some fault in the way the Council acted – even if it has agreed to put things right during the course of the Ombudsman investigation; or had already accepted it needed to remedy the situation before the complaint was apparent to the Ombudsman.

2.3.2 The actions required of the Council by the Ombudsman are included within Appendix D of the complaints upheld the remedies entailed apologies, financial redress (in 6 of the decisions) and new appeal/review or reconsidered decision.

2.3.3* In relation to Childrens Services complaints, the majority of complaints involving the LGO are SEND (Special educational needs and disabilities) related. There had been a high turnover of team managers in the service and this year a Strategic Lead was appointed. There is also a team manager now in post who fully understands the work and role of the unit having been a senior caseworker previously in Bury. Until recently the service was receiving a high number of complaints regarding SEND but this has now improved with the staffing appointments making a real impact in organising a more cohesive team with better functioning. Therefore the LGO data for this service area in 2022-2023 should see a reduction in figures.

3. OMBUDSMAN'S ANNUAL REVIEW LETTER

- 3.1 The Annual Review letter provides an annual summary of statistics on the complaints made to the Local Government Ombudsman (LGO) about this Council to the year ending 31 March 2022.
- 3.2 The LGO has an interactive map of performance. The map shows annual performance data for all Councils in England, with links to published decision statements, public interest reports, annual letters and information about service improvements that have been agreed by each Council. The intention of this tool is to place a focus on the authority's compliance with the recommendations. The interactive map can be accessed via the following link:
<https://www.lgo.org.uk/your-councils-performance/bury-metropolitan-borough-council/statistics>
- 3.3 It is intended that the information provided by the Ombudsman, set alongside the data the Council records about local complaints, will assist in assessing the Council's performance.

4. FUTURE DEVELOPMENTS

- 4.1 It should also be acknowledged that complaints to the Ombudsman do not always involve the Council or its appeals processes or any wrongdoing; but that they come from people who would have liked something more, or better, or a different outcome. It is unlikely that public expectations of services will diminish in the short term and therefore there is no reason to suppose that complaints will fall significantly. Despite these challenges, employees are making every effort to ensure that capacity to respond to the Ombudsman is maintained.
- 4.2 It remains the case that the Council does not receive significant criticism from the Ombudsman and therefore we should continue to deliver services within our policy and procedural guidelines, as well as within statutory requirements.
- 4.3 It is important that the Council takes even greater measures to ensure that it is able to evidence that it learns from complaints and uses this learning to improve and maintain the quality of the services it commissions and provides.
- 4.4 In comparison to other GM authorities, data patterns are as follows:-

Authority	Bury	Rochdale	Bolton	Oldham
Complaints Upheld	11	13	14	13
Implemented recommendations	100%	100%	100%	100%
Satisfactory remedy	18% <i>This compares to an average of 11% in similar organisations.</i>	15%	14%	0%

Contact Details:

Democraticservices@bury.gov.uk

Local Government & Social Care OMBUDSMAN

20 July 2022

By email

Mr Little
Chief Executive
Bury Metropolitan Borough Council

Dear Mr Little

Annual Review letter 2022

I write to you with your annual summary of complaint statistics from the Local Government and Social Care Ombudsman for the year ending 31 March 2022. The information offers valuable insight about your organisation's approach to complaints. As such, I have sought to share this letter with the Leader of your Council and Chair of the appropriate Scrutiny Committee, to encourage effective ownership and oversight of complaint outcomes, which offer such valuable opportunities to learn and improve.

Complaint statistics

Our statistics focus on three key areas that help to assess your organisation's commitment to putting things right when they go wrong:

Complaints upheld - We uphold complaints when we find fault in an organisation's actions, including where the organisation accepted fault before we investigated. We include the total number of investigations completed to provide important context for the statistic.

Compliance with recommendations - We recommend ways for organisations to put things right when faults have caused injustice and monitor their compliance with our recommendations. Failure to comply is rare and a compliance rate below 100% is a cause for concern.

Satisfactory remedy provided by the authority - In these cases, the organisation upheld the complaint and we agreed with how it offered to put things right. We encourage the early resolution of complaints and credit organisations that accept fault and find appropriate ways to put things right.

Finally, we compare the three key annual statistics for your organisation with similar authorities to provide an average marker of performance. We do this for County Councils, District Councils, Metropolitan Boroughs, Unitary Councils, and London Boroughs.

Your annual data, and a copy of this letter, will be uploaded to our interactive map, [Your council's performance](#), on 27 July 2022. This useful tool places all our data and information about councils in one place. You can find the detail of the decisions we have made about your Council, read the public reports we have issued, and view the service improvements your Council has agreed to make as a result of our investigations, as well as previous annual review letters.

Supporting complaint and service improvement

I know your organisation, like ours, will have been through a period of adaptation as the restrictions imposed by the pandemic lifted. While some pre-pandemic practices returned, many new ways of working are here to stay. It is my continued view that complaint functions have been under-resourced in recent years, a trend only exacerbated by the challenges of the pandemic. Through the lens of this recent upheaval and adjustment, I urge you to consider how your organisation prioritises complaints, particularly in terms of capacity and visibility. Properly resourced complaint functions that are well-connected and valued by service areas, management teams and elected members are capable of providing valuable insight about an organisation's performance, detecting early warning signs of problems and offering opportunities to improve service delivery.

I want to support your organisation to harness the value of complaints and we continue to develop our programme of support. Significantly, we are working in partnership with the Housing Ombudsman Service to develop a joint complaint handling code. We are aiming to consolidate our approaches and therefore simplify guidance to enable organisations to provide an effective, quality response to each and every complaint. We will keep you informed as this work develops, and expect that, once launched, we will assess your compliance with the code during our investigations and report your performance via this letter.

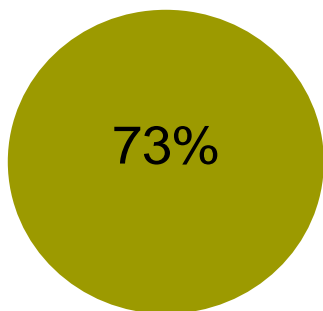
An already established tool we have for supporting improvements in local complaint handling is our successful training programme. We adapted our courses during the Covid-19 pandemic to an online format and successfully delivered 122 online workshops during the year, reaching more than 1,600 people. To find out more visit www.lgo.org.uk/training.

Yours sincerely,

A handwritten signature in black ink, appearing to be 'MK' with a stylized flourish underneath.

Michael King
Local Government and Social Care Ombudsman
Chair, Commission for Local Administration in England

Complaints upheld



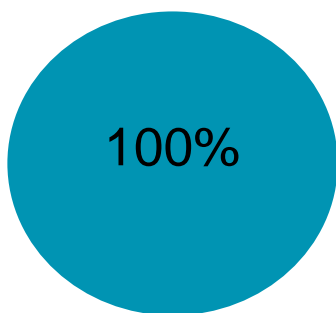
73% of complaints we investigated were upheld.

This compares to an average of **68%** in similar organisations.

11
upheld decisions

Statistics are based on a total of **15** investigations for the period between 1 April 2021 to 31 March 2022

Compliance with Ombudsman recommendations



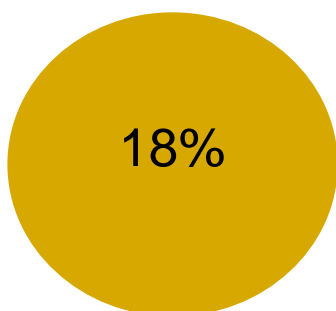
In **100%** of cases we were satisfied the organisation had successfully implemented our recommendations.

This compares to an average of **100%** in similar organisations.

Statistics are based on a total of **9** compliance outcomes for the period between 1 April 2021 to 31 March 2022

- Failure to comply with our recommendations is rare. An organisation with a compliance rate below 100% should scrutinise those complaints where it failed to comply and identify any learning.

Satisfactory remedy provided by the organisation



In **18%** of upheld cases we found the organisation had provided a satisfactory remedy before the complaint reached the Ombudsman.

This compares to an average of **11%** in similar organisations.

2
satisfactory remedy decisions

Statistics are based on a total of **11** upheld decisions for the period between 1 April 2021 to 31 March 2022

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Classification: Open	Decision Type: Non-Key
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Report to:	Standards Committee	Date: 15 November 2022
Subject:	Contract Procedure Rules	
Report of	Cabinet Member for Finance and Communities	

Summary

This report sets out proposals for new Contract Procedure Rules (CPR) that will form part of the Council Constitution. As part of the process of developing and agreeing new CPRs, the audit committee was consulted on the draft proposals in January 2021. This report sets out the final draft proposal. Feedback from the Standards Committee and Audit committee will be reflected in final proposals that will be presented to Full Council on 7th December 2022 for implementation from 1 February 2023.

Cipfa C.Co drafted the proposed rules over two years ago, therefore these have been further developed and amended by STAR Procurement to reflect more recent changes and best practice.

Recommendation(s)

- Note the content of the report and provide feedback on the final draft Contract Procedure Rules
- Note that the final draft Contract Procedure Rules will be presented to Full Council in December 2022 for final approval prior to implementation from 1 February 2023
- Note the draft implementation plan and provide feedback for rolling out the processes aligned to the Contract Procedure Rules
- Note and provide feedback on the draft Procurement Guide

Reasons for recommendation(s)

Provides up to date and appropriate Contract Procedure Rules with associated Procurement Guide. The implementation plans will ensure effective implementation of the approach.

Alternative options considered and rejected

The current Contract Procedure Rules are dated 2016 and require significant updating as they contain out-dated information including Regulations, Thresholds, and a combination of both rules and requirements as well as guidance and advice. They are over-bureaucratic with complex governance arrangements.

The proposed approach will streamline processes whilst ensuring that specialist advice and support is provided by specialist staff for the highest value and highest risk tenders. The development of the Procurement Guide will ensure that managers are fully supported and that consistent procedures are in place across the Council.

Report Author and Contact Details:

Name: Nichola Cooke

Position: STAR Procurement

Department: Strategic Procurement

E-mail: n.cooke@bury.gov.uk

1. Background

- 1.1. Contract Procedure Rules (CPR) form part of the Council's Constitution and govern the way contracts for supplies, services and works are procured and awarded. As part of the agreed governance review it was agreed that a review of the Council's procurement processes and rules would be carried out.
- 1.2. To inform this work, all managers engaged in procurement activity have been consulted by Cipfa C.Co. This was carried out in two phases: an initial consultation questionnaire followed by stakeholder group meetings to feedback a number of key findings and to test some of the initial thinking. The outcome of these key pieces of work has been used to inform the draft CPRs.
- 1.3. As this work was undertaken over two years ago, a further update and review has been undertaken by STAR Procurement to ensure the Contract Procedure Rules are future-proofed for the upcoming Regulation changes, to provide flexibility in the way procurement is delivered operationally and to reflect best practice. The Procurement Guide and Implementation Plan have also been developed. Consultation has taken place with colleagues from Strategic Procurement, Finance, Legal and Audit.

2. Key Changes

- 2.1. The final draft Contract Procedure Rules are attached at Appendix 1 and the main changes are summarised as follows:
 - Focus on rules and requirements, with advice and guidance moved to Procurement Guide (See Appendix 2)
 - The level at which 3 quotes are needed is proposed to increase from £1k to £10k and will reduce unnecessary bureaucracy and achieve better value for money overall for the Council. This brings Bury in-line with other Greater Manchester Authorities
 - Specific requirements regarding the Contracts Register to reflect the findings of Contracts Register audit report.
 - It is proposed that the procurement service will continue their advisory approach for low value tenders and that the work be undertaken by services. Low level tenders are anything with a value of up to £50k.
 - Process for tenders up to £50k will be supported by a Procurement Guide that will advise and support services through up to date guidance, standard templates and access to The Chest when needed.
 - All tenders above £50k will be coordinated by the procurement service. This ensures professional expertise is targeted at higher risk/value contracts and used to inform the approach to market, including the appropriateness of

openly advertising requirements or inviting selected bidders to tender for contracts up to regulation Threshold.

- Specific rules relating to residential care and educational placements to reflect the legal requirement to consider individual choice. The requirement for legal to seal placement contracts is also removed.
- Future proofed the wording and terminology to reflect the proposed new Regulations and changes in Thresholds

3. Implementation Plan

- 3.1. This report sets out the final draft proposal. Feedback from the committee will be reflected in final proposals that will be presented to Full Council on 7th December 2022 for implementation from 1 February 2023.
- 3.2. A detailed implementation plan has been developed to support 1st February 2023 implementation date. The implementation plan includes approvals, development of new templates, training (including in-person and on-line), communications and development/update of linked documents.
- 3.3. In summary the implementation plan includes:

Theme	Task	Milestone
Approvals	Full Council meeting	Dec 2022
Templates	Procurement Guide	Dec 2022
	Starting a procurement form	
	Award Report	
	Declaration of Interest	
	Exemption/modification form	
	RFQ	
	ITT	
	The Chest work flows	
Training	In-person training	Jan 2023
	Training via TEAMS	
	Recording of training	
	Manager Programme	
Communications	Council website	Jan 2023
	Intranet pages	
	Comms Plan	
Linked documents	Scheme of delegation	TBC
	Financial Procedure Rules	
	Procurement of External Expertise	

4. Procurement Guide

- 4.1. The Procurement Guide provides advice and guidance for sub-Threshold procurements. This will ensure that managers are fully supported and that consistent procedures are in place across the Council. This will help to address previous issues highlighted by Internal Audit.
- 4.2. The Procurement Guide can be regularly updated by Strategic Procurement to reflect new Regulations, updated guidance provided by Government, and any

new best practice and/or lessons learnt. A copy of the draft Procurement Guide is included in Appendix 2.

Links with the Corporate Priorities:

5. The Let's Do It Strategy sets out the corporate priorities and the Contract Procedure Rules help to deliver the following outcomes:
- Delivering inclusive economic growth by continuing our commitment to Bury-based businesses and reducing the complexity and bureaucracy of our procurement approach
 - Delivering carbon neutrality by 2038, improved quality of life, improved educational attainment and increased adult skill levels and employability by including guidance on Social Value

Equality Impact and Considerations:

6. The proposed Contract Procedure Rules do not bring about any changes that would impact on one protected characteristic over and above another, it doesn't result in increased/decrease access to services or provision for any particular group of the population or cause any disadvantage to a community of interest. The approach is to ensure value for all contracts and thus strive to mitigate Council costs, which would benefit all residents

Environmental Impact and Considerations:

7. Environmental impact and considerations in procurement are addressed through Social Value. The Procurement Guide provides information on how this can be achieved and potential measures that can be included in contracts.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Revising CPRs in this way represents a risk based approach to resource allocation. Limited professional procurement expertise will be focussed on the highest risk/highest value contracts.	Procurement Guide and training will be put in place to ensure service based officers understand and can apply the rules appropriately. Governance controls will be strengthened through the introduction of new processes and templates to record and approve actions

Implementation of revised rules across the Council in a short period of time	A detailed implementation plan has been developed, including mandatory training
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Legal Implications:

The Council is required to have Contract Procedure Rules under section 135 of the Local Government Act 1972 and to review them periodically. The revised Rules have the support of Audit, Finance and Legal Services. The increase in the procurement thresholds involves greater devolved procurement to Council departments and consequently a degree of non-compliance risk attaches. However this is properly mitigated through the implementation plan which includes mandatory training, supplemented with a comprehensive procurement guide and model templates and processes. The revised Rules are recommended for adoption on that basis.

8.

Financial Implications:

The implementation of strong and consistent Contract Procedures Rules and the roll out of an education and training programme for all who use them will help to ensure the Council achieves best value for money in all of its procurements.

Background papers:

Appendix 1: Final Draft Contract Procedure Rules

Appendix 2: Final Draft Procurement Guide

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
CPR	Contract Procedure Rules
Contracts Register	A database of all Council Contracts maintained by the Strategic Procurement Team
Procurement Guide	A document providing advice, guidance and policies regarding operational procurement at Bury Council. It supports the CPR's but does not form part of the constitution
Social Value	The concept of seeking to maximize the additional benefit that can be created by procuring or commissioning goods and services, above and beyond the benefit of merely the goods and services themselves

Threshold	The Threshold pertaining to the values of Supplies, Services or Works derived from Regulations
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Bury Council

Contract Procedure Rules

2022

Issued TBC

Review Date TBC

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Definitions

Term	Definition
Best Value	The Council's duty under Part 1 of the Local Government Act 1999 to secure continuous improvement in the way in which functions are carried out, having regard to economy, efficiency and effectiveness
Bidder	means any Economic Operator that submits a Quote.
Call-Off Contract	means an order placed or a contract awarded in accordance with an established Framework Agreement or DPS
Concession Contracts	Where the consideration consists either solely in the right to exploit the work or service, or in this right to exploit together with payment.
Conflict of Interests	An actual conflict, or a potential conflict, between the pecuniary or personal interests of an officer and the duties that the officer owes to the Council
Contract	An agreement between two or more parties relating to supplies, services, utilities or the execution of works for payment or otherwise by an agreement intended to bind those parties.
Contracts Register	A database of all Council Contracts maintained by the Strategic Procurement Team
Dynamic Purchasing System	An agreement or other arrangement which establishes the terms under which the Provider will enter into one or more Contracts with the council or other Public body during the period in which the Dynamic Purchasing System applies
e-tendering system	The council's electronic procurement portal for the advertisement, receipt of tenders and conducting the Council's procurement process
Find a Tender Service	Means the e-procurement portal by which above Regulation Threshold tenders are advertised.
Framework Agreement	An agreement or other arrangement which establishes the terms under which the

	Provider will enter into one or more Contracts with the council or other Public body during the period in which the Framework Agreement applies
MAT (Most Advantageous Tender)	The evaluation or scoring of tenders using objective criteria covering price and quality, where the resulting Contract is awarded to the tender that achieves the highest score in that assessment
Notice	An advert giving details of the Contract being procured. The issue of the Public Procurement Notice starts the above Regulation Threshold tender process
Threshold	The Threshold pertaining to the values of Supplies, Services or Works derived from Regulations
Procuring Officer	The service team Officer who is responsible for the procurement process. This also includes third parties who are procuring on behalf of the Council.
Strategic Procurement	The member of the Strategic Procurement Team who has been assigned to the procurement exercise
Procurement Guide	Contains further detailed practical guidance and information on procurement requirements and process steps which Procuring Officers must refer to when undertaking procurement activities
Provider	An organisation that supplies goods to, provides services to or undertakes works for the Council.
Regulations	Regulations that govern public procurement procedures for Contracts with a value over specific Thresholds
Revenue earning Contract or Concession Contract	A Contract where either part of the consideration is a share for the Council of any income generated by the Provider or where the Council is acting as a Provider to another party.
Social Value	The concept of seeking to maximize the additional benefit that can be created by procuring or commissioning goods and services, above and beyond the benefit of merely the goods and services themselves

Specification	means the outputs, outcomes and the scope and nature of Goods, Services, execution of Works or Concessions Contract required by the Council from a procurement activity.
SQ – Supplier Questionnaire	The national standard questionnaire produced by Cabinet Office for use in shortlisting suppliers when using a two-stage procedure, or for confirming supplier credentials in a single stage procedure

1 Introduction

- 1.1 These Contract Procedure Rules (CPRs) are made under the provisions of Section 135 of the Local Government Act 1972 and govern the making of Contracts for and on behalf of the Council.
- 1.2 The CPRs form part of the Council's Constitution and will be reviewed annually.
- 1.3 Compliance with the CPRs and observance of all relevant legislation from which they emanate in particular, but not limited to: the Public Procurement (Amendments, Repeals and Revocations) Regulations 2016; the Public Contracts Regulations 2015; Concession Contracts Regulations 2016; Equality Act 2010; Public Services (Social Value) Act 2012; the Local Government (Transparency Requirements) (England) Regulations 2015 (As amended from time to time); and the associated principles relating to fairness, non-discrimination, equal treatment and transparency, is mandatory for all Officers and Members.
- 1.4 These rules also apply to any third party, such as a consultant, who may be undertaking procurement on behalf of the Council. The responsibility for ensuring the rules are followed rests with the relevant Procuring Officer. Advice should be sought from the Strategic Procurement Team if in any doubt.
- 1.5 Procurements above the Regulation Threshold must comply with all relevant public procurement legislation. Where there is any conflict between legislation and these CPRs, the legislation will always prevail.
- 1.6 Value for money is fundamental to the procurement activity carried out by the Council. The Council has a best value duty under Section 3 of the Local Government Act 1999 having regard to a combination of economy, efficiency and effectiveness. This should be achieved through competition, unless there are compelling reasons to the contrary.
- 1.7 In all situations where the Council is the lead authority or the contracting body, procurement will be subject to these CPRs. Exemptions to the rules will be permitted only in the specific circumstances referred to in these CPRs.
- 1.8 These CPRs should be read in conjunction with the Councils Financial Procedure Rules and any advice, guidance and policies issued by Strategic Procurement ([link to Procurement Guide](#)).
- 1.9 Breaches of these CPRs will be investigated and may result in disciplinary action.

1.10 The CPRs do not apply to:

- Contracts of employment for the appointment of individual members of staff.
- Grant funding agreements – for grant agreements the appropriate guidance must be followed
- Contracts where the Council is the supplier of Works, Goods and/or Services to third party organisations. However, the Monitoring Officer and the S151 Officer must be consulted in situations where the council is contemplating acting as a supplier.
- Contracts procured in collaboration with other local authorities where the council is not the lead authority (subject to the necessary approvals having been obtained from the appropriate decision maker at the council). The CPRs of the lead authority shall apply. Assurance should be sought that the lead authority is in compliance with its own Contract Procedure Rules and Regulations.
- Contracts procured through frameworks let by other Contracting Authorities in compliance with Public Procurement legislation.
- Public to public Contracts e.g. between Bury Council and another local authority, which meet the provisions of Regulation 12 of the Public Contracts Regulations 2015. The Monitoring Officer and the Head of Strategic Procurement must be consulted where the Council is contemplating this route.
- Works, Supplies and Services procured from in-house companies which meet the criteria for the Teckal exemption e.g. Six Town Housing, Persona
- Contracts relating solely to the disposal or acquisition of securities;
- Contracts for the acquisition of an interest in land and property;
- Contracts for the appointment of Counsel or the appointment of experts for the purpose of legal, or potential legal proceedings by the SRO for Legal Services; and
- Any Contracts specifically excluded by relevant legislation

2. General Rules

- 2.1 Prior to commencing a procurement process, approval for the expenditure must be obtained from the relevant budget holder/officer in accordance with Financial Procedure Rules: Scheme of Delegation – Financial Limits
- 2.2 Procuring Officers should not agree to verbal offers from Suppliers as this can create a binding Contract.
- 2.3 Adequate records of the procurement process must be retained. This includes records of any discussions held with stakeholders and/or potential Bidders prior to the issue of an advert or Contract Notice as part of soft market testing activity, any evaluation documentation including presentations or interviews held with Bidders and Contract award and unsuccessful notifications. Electronic copies of Contracts shall be kept of

each procurement process for a minimum period in accordance with the Council's Records Management Policy and public procurement legislation.

3. Conflicts of Interest and Anti-Bribery and Corruption

- 3.1 The Council's reputation with regards to procurement activity is important and should be safeguarded from any imputation of dishonesty or corruption. Advice should be sought from Strategic Procurement prior to any discussions to ensure that any conflicts of interest are recorded, and mitigation measures put in place.
- 3.2 No gifts or hospitality should be accepted from any Bidders or Tenderers involved in procurement activity except in accordance with the Council's Codes of Conduct.
- 3.3 Every Officer (including temporary, agency and interim staff) or Councillor involved in any decision in respect of the award of a Contract in which they, or any immediate member of their family, or close associate has a Pecuniary Interest shall immediately notify the lead Procurement Officer who shall make a record in the contract file and forward to the Monitoring Officer for inclusion in the register kept for the purpose under s.117 Local Government Act 1972 (Disclosure by officers of interest in contracts)
- 3.4 In the event of any doubt or uncertainty as to whether a Pecuniary Interest will occur, advice should be sought from the Head of Strategic Procurement who will consult with the Head of Audit and Monitoring Officer.

4 The Procurement Process

- 4.1 The table that follows sets out how a procurement process must be undertaken based on the total value of the Contract over its full period, including extensions, where applicable.

Anticipated Contract value (exc VAT)	Procurement Route	Advertising	Evaluation	Approval	Authority to Sign Contract
Below £10,000	Obtain at least one written Quotation Where the value is less than £1,000 this can be evidenced by price list or website information Process conducted and managed by Service team	Not required. Bury suppliers to be invited where available.	Lowest price.	In accordance with the Financial Procedure Rules: Scheme of Delegation – Financial Limits	Use Purchasing Card or raise a Purchase order No requirement for a signed Contract

	including written Specification or Statement of Requirements Advice available from Strategic Procurement				
£10,001 to £50,000	<p>Request for Quotation (RFQ)</p> <p>Obtain at least three written quotations</p> <p>Process conducted and managed by Service team including written Specification or Statement of Requirements</p> <p>Advice must be sought from Strategic Procurement unless otherwise agreed by Head of Strategic Procurement</p>	<p>Not required</p> <p>(If three Providers cannot be identified, openly advertise. If openly advertised then contact Strategic Procurement to advertise on e-tendering system and on Contracts Finder website (if above £25k)</p> <p>Bury suppliers to be invited where available.</p>	<p>Lowest price or most advantageous based on criteria published with the request for quotation.</p>	<p>Complete Award Report and attach copies of the quotations.</p> <p>then</p> <p>If this is a new Supplier request a New Supplier Set up form is completed and submitted to Accounts Payable.</p> <p>Retain Award Report with quotes.</p> <p>Approval in accordance with Scheme of Delegation as detailed in Financial Procedure Rules: Scheme of Delegation – Financial Limits</p>	<p>Purchase Order and</p> <p>If the Council's Standard Contract terms used (or if procured via a valid framework, the relevant Call-off Contract is used, or an industry standard Contract is used for a works Contract) then an Officer in accordance with the Financial Procedure Rules: Scheme of Delegation – Financial Limits</p> <p>or</p> <p>If a bespoke Contract then Legal Services Authorised Signatory</p> <p>If openly advertised and above £25k issue Contract Award Notice on Contracts Finder</p>
£50k to Regulation Threshold	<p>Invitation to Tender (ITT)</p> <p>Obtain a minimum of 3 tenders</p>	<p>If openly advertised use e-tendering system and</p>	<p>Most Advantageous Tender</p>	<p>An Award Report must be completed.</p> <p>If this is a new Supplier request a New Supplier</p>	<p>Purchase Order and</p> <p>If the Contract value is less than £100,000 and the</p>

	<p>Advice must be sought from Strategic Procurement before commencing and a “Starting a Procurement” form completed.</p> <p>Tender process using e-tendering system.</p> <p>A single stage ITT must be used for all Contracts up to the Works, Goods and Services Threshold.</p> <p>Managed by Strategic Procurement, unless otherwise agreed by Head of Strategic Procurement</p>	<p>Contracts Finder</p> <p>If not openly advertised, Bury suppliers to be invited where available.</p>		<p>Set up form is completed and submitted to Accounts Payable. Confirm Award Report in place. Retain Award Report with quotes</p> <p>Approval in accordance with Financial Procedure Rules: Scheme of Delegation – Financial Limits</p>	<p>Council's relevant Standard Conditions of Contract is used (or framework terms if applicable) then an Officer in accordance with Financial Procedure Rules: Scheme of Delegation – Financial Limits</p> <p>or if the Contract value is more than £100,000 or</p> <p>if a bespoke Contract is used then Legal Services Authorised Signatory</p> <p>Legal proforma – instruction to award to be completed</p> <p>If openly advertised issue Contract Award Notice on Contracts Finder</p>
Over Regulation Threshold	<p>Advice must be sought from Strategic Procurement before commencing and a “Starting a Procurement” form completed.</p> <p>Tender process using the Council's e-tendering system</p> <p>An Open procedure</p>	<p>Council's e-tendering system</p> <p>Contracts Finder Website</p> <p>and</p> <p>Find a Tender Service</p>	Most advantageous Tender	<p>Contracts below £500k in value that are non-key decisions can be approved by the relevant Executive Director.</p> <p>Contracts above £500k and are key decisions and delegated authority should be sought from Cabinet to award the Contract when the evaluation is completed.</p>	<p>Legal proforma – instruction to award to be completed</p> <p>Purchase Order</p> <p>Issue Contract Award Notice on Contracts Finder and Find a Tender Service</p>

	single stage ITT to be used or by exception an alternative procedure as stated in the Public Contracts Regulations with a justification approved by the Head of Strategic Procurement Managed by Strategic Procurement.			Award Report to be completed.	
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4.2 Starting a Procurement

- 4.2.1 Where the Council has an existing Contract in place that is suitable to source the services, supplies or works required this should be used. Approval for not using an existing Contract must be sought in advance from the relevant Strategic Procurement Officer and the technical or economic reasoning for not using the existing Contract should be recorded in the 'Starting a Procurement' form.
- 4.2.2 Where the Procuring Officer wishes to use a Framework Agreement, it is the duty of that individual to ensure that the agreement has been procured in a legally compliant manner and that the Council is legally able to access the agreement. The Procuring Officer should also ensure requirements in any access agreement, guidance notes or instructions are followed to ensure the procurement is compliant with Regulations. Failure to do this will make any Contract awarded from the framework (and potentially the whole framework) invalid. The Procuring Officer should seek guidance from Strategic Procurement where required.
- 4.2.3 If the value of a Contract is forecast to be less than £50,000 advice should be sought from Strategic Procurement prior to commencement but the procurement will be led by the Procuring Officer. Procuring Officers must adhere to the requirements outlined in the table above and award in accordance with authorisations set out in the Financial Procedure Rules: Scheme of Delegation – Financial Limits. The Procurement Guide provides advice and guidance on the processes and best practice.
- 4.2.4 If the value of a Contract is forecast to be £50,000 or greater, a 'Starting a Procurement' form must be completed and submitted to Strategic Procurement prior to the commencement of a procurement process.
- 4.2.5 If there is agreement between the Head of Strategic Procurement and a service team that a Procuring Officer within the service team will lead a procurement

above £50,000, the Procuring Officer shall complete a 'Starting a Procurement form' and record this agreement within the form.

4.2.6 In the event where a Contract has no specific end date, such as ongoing support or maintenance Contracts, then for the purposes of these rules the Contract Value should be considered over four years.

4.2.7 If the value of any Contract (including for works or social services) is forecast to be greater than £500k then delegated authority to commence the procurement process must be sought from the Cabinet.

4.2.8 A Conflict of Interest declaration form must be completed by all parties involved in a procurement process at the appropriate stage. This applies to Officers (including temporary, agency and interim staff) and Elected Members.

4.2.9 In the event of a Conflict of Interest the Head of Strategic Procurement, following consultation with the Monitoring Officer and Audit, shall determine the appropriate course of action to be taken based on the facts of the particular situation.

4.3 Publishing Contract Notices (Advertising Contracts)

4.3.1 All procurement documentation must be completed prior to publishing the Contract Notice. This, as a minimum must include the Specification, Contract terms, pricing model and other evaluation criteria and background documentation.

4.4 Selection Questionnaires (SQ)

4.4.1 The standard Selection Questionnaire (SQ) is the document used by the Council to screen potential tenderers in accordance with Regulations. For Works Contracts, the PAS91 questionnaire can be used in place of the standard SQ.

4.4.2 A pre-qualification stage must not be used in any procurement below the Regulation Thresholds for supplies and services. A completed SQ must however, be obtained from the winning Bidder prior to award of any Contract over £50k.

4.5 Contents of a Request for a Quotation (RFQ) or an Invitation to Tender (ITT)

4.5.1 A **Request for a Quotation (RFQ)** is used for procurements with a value less than £50,000. Evaluation and award of Contract will normally be based on the lowest price, or the most advantageous tender based on criteria published with the RFQ.

4.5.2 An **Invitation to Tender (ITT)** is used for procurements with a value greater than £50,000 or by exception for complex and high-risk procurements of any value. Evaluation and award will be determined by the most advantageous tender based on criteria published with the ITT.

4.5.3 The standard template for a RFQ or an ITT must be used and include all the information set out in the template. Templates are maintained and updated by Strategic Procurement.

- 4.5.4 The **Specification** must describe the Council's requirements in sufficient detail to enable the submission of competitive offers and follow the Procurement Guide. A risk analysis of the scope and Specification of the Contract should be undertaken and included as additional Contract conditions if required.
- 4.5.5 **Evaluation criteria** must comply with the information in the table at 4.1 above in relation to relevant Contracts values. All evaluation criteria and sub criteria, any financial models and a clear scoring matrix must be included in the RFQ, or ITT documentation and full details disclosed to potential Bidders. The evaluation process must follow the published criteria without deviation.
- 4.5.6 The methodology for **evaluating price** should be clearly set out in the RFQ or ITT.
- Where appropriate, the whole life cycle cost, including cost of operation, maintenance and end of life, should be considered.
 - Where appropriate the implementation costs, including training, process redesign and system integration, should be considered.
- 4.5.7 **Conditions of Contract**
- In most circumstances the Council's standard forms of Contract should be used for supplies and services. The relevant Contract conditions must be issued with the RFQ/ITT.
 - Where procurement is via an existing Framework Agreement, the conditions of contract will be those governing the framework and Call-off Contracts.
 - For works contracts (other than those for minor works where the Council's standard services Contract may be appropriate) standard industry forms must be used, for example, JCT, NEC.
 - Where there is a need to deviate from the Council's standard forms of Contract or amendments are required to works standard industry forms (due to the risk imposed by the nature of the procurement or where the standard Contract is deemed to be unsuitable), Contract terms must be drafted by Legal Services prior to the RFQ or ITT being advertised.
 - Contracts on supplier's conditions will only be entered into by exception and must be approved in advance by Legal Services for Contracts over £10k.

4.6 Advertising Durations

- 4.6.1 A RFQ should be advertised for a period of time appropriate to the complexity of the procurement and to ensure there are sufficient quotes received to demonstrate that a proper competition has taken place. As a minimum this should be 7 days, unless otherwise agreed by Strategic Procurement.
- 4.6.2 An ITT should be advertised for a period of time appropriate to the complexity of the procurement, as a minimum this should be 14 days, unless otherwise agreed by Strategic Procurement
- 4.6.3 If a Framework is being used, the timescales set out in the Framework should be followed.
- 4.6.4 Where the Contract value is above the Regulation Thresholds then the appropriate minimum time periods in accordance with Regulations must be followed.

- 4.6.5 If a reduced timescale is required due to genuine urgent need, then this must be recorded and approved by Strategic Procurement prior to the procurement commencing.

4.7 Contract value and duration

- 4.7.1 Prior to a procurement being undertaken an estimate of the total Contract value over its full duration, including any extension options must be established. A record of how this forecast was calculated should be retained in the 'Starting a Procurement' form.
- 4.7.2 The value of the Contract must not be split to avoid the application of the CPRs and Regulations.
- 4.7.3 The appropriate length of individual Contracts should be considered pre-procurement taking account of Regulations, commercial factors such as market conditions and required investment, and internal considerations such as implementation costs and cost of change.

4.8 Transfer of Undertakings Protection of Employment (TUPE) and Pensions

- 4.8.1 Where a service is already being provided and is being retendered or tendered for the first time, the TUPE regulations need to be considered and if applicable, incorporated within the ITT. Where appropriate, information will need to be requested from current contractors.
- 4.8.2 Advice from Legal Services should be sought at the earliest point that the Procuring Officer becomes aware that a staff transfer may form part of the procurement. The relevant HR Business Partner must also be consulted if Council staff may be affected.
- 4.8.3 Where a transfer of staff will occur, Pensions liabilities and the arrangements for these need to be considered, and specialist advice sought from Strategic Procurement, Legal Services, HR and Finance.

4.9 Appointment of Temporary, Agency, Interim Resources & Consultants

- 4.9.1 Advice must be sought from the relevant HR Officer prior to commencing the appointment of any temporary, agency and interim staff and the guidance on procurement of external expertise must be followed.
- 4.9.2 The appointment of temporary, agency and interim staff must be in accordance with these CPRs, with the addition of an HR business case being approved. The appropriate guidance on procurement of external expertise must also be followed.
- 4.9.3 The appointment of temporary, agency and interim staff with an equivalent day rate of £500 or more must be approved by the Head of HR and the Cabinet Member for Corporate Affairs and HR prior to commencing the appointment.

- 4.9.4 The appointment of temporary, agency and interim staff with an equivalent day rate of £499 or less must be approved by the relevant HR Business Partner and Finance Advisor prior to commencing the appointment.
- 4.9.5 A copy of the completed Executive Team approval must be retained on the contract file.
- 4.9.6 In the event that temporary, agency or interim staff are proposed to transfer employment to become permanent employees, then it is likely that transfer, finders or similar fees will be charged by the agency. Approval must be obtained in advance from the relevant HR Business Partner prior to any transfer of employment and payment of relevant fees.
- 4.9.7 Contracts for consultancy services shall be procured in accordance with the Contract Procedure Rules and the guidance on procurement of external expertise.

4.10 Communications with tenderers during the procurement process

- 4.10.1 All communications with tenderers after the RFQ or ITT has been issued must be conducted via the secure messaging service which forms part of the e-tendering system, or via email for those RFQs below £50k that have been issued by email.
- 4.10.2 Questions from Bidders must be submitted electronically, for RFQs by e-mail or through the e-tendering system where this has been used. Responses to questions must be shared with all Bidders unless there is an overriding commercial or confidential reason not to. Advice should be sought from Strategic Procurement if there is any uncertainty.
- 4.10.3 During the procurement process, verbal communication should not be entered into except to provide instruction on using the e-tendering system or in exceptional circumstances following advice from Strategic Procurement.

4.11 Quotation and Tender opening and late submissions

- 4.11.1 All responses to SQs or ITTs must be submitted electronically through the Council's e-tendering system where they will remain locked until the closing time and date.
- 4.11.2 For RFQs which have not used the Council's e-tendering system, responses should be returned by email to the Procuring Officer. Evaluation of quotations should not take place until all quotations have been received or the closing date and time has passed, whichever is soonest.
- 4.11.3 Late submissions will only be accepted in exceptional circumstances e.g. if the other quotations/tenders have not been opened and/or there has been a failure of the e-tendering or email system, or if the failure to comply is the fault of the Council.
- 4.11.4 The final decision on whether a tender will be accepted is at the discretion of the Head of Strategic Procurement.

- 4.11.5 The date for receipt of tenders may only be extended in exceptional circumstances. This must be approved by Strategic Procurement and the reasons documented.

5 Evaluation

- 5.1 Evaluation of SQ responses, quotations and tenders must be in accordance with the criteria and scoring published with the SQ, RFQ or ITT. In the event no criteria have been published in the RFQ or ITT then the evaluation will be based on lowest price.
- 5.2 No information about SQ responses, quotations and tenders should be shared with competing organisations during the tender period.
- 5.3 Clarifications of SQ responses, quotations and tenders may be requested from Bidders and must be made in writing using the e-tendering system or via email for RFQs issued by email.
- 5.4 Negotiations with tenderers are only permitted in limited instances with approval of Strategic Procurement.
- 5.5 Once a SQ, RFQ or ITT has been evaluated and the successful organisation selected, only minor refinements that do not substantially change the tenderer's proposal or the commercial position, can be made. Advice should be sought from Strategic Procurement in advance.
- 5.6 Evaluation should involve a minimum of two officers and should follow Procurement Guide.
- 5.7 Evaluators must come to a consensus on scores awarded, scores must not be averaged.
- 5.8 Justification and reasons for the scores awarded must be recorded and retained in accordance with Regulations. This information is to be used for providing feedback to Bidders.

6. Awarding a Contract

- 6.1 Approval to award the Contract must be obtained prior to the award being carried out in accordance with the table in Section 3.
- 6.2 A 10-day standstill period between notification of the Contract award and the Contract Award must be included for relevant Contracts with a value above the Regulation Threshold.
- 6.3 Officers must not issue letters of intent, memorandums of understanding or similar communications without the prior approval of Legal Services.
- 6.4 Contracts should be signed in accordance with the table in Section 3 of these Rules. Contracts should only be signed after the correct approval to award has been granted.
- 6.5 Certain categories of Contracts must be executed as deeds and are to be sealed by the council by affixing the common seal or appropriate electronic alternative. This means that in the event of a dispute, the council can make a claim under the Contract for up to 12 years. The following Contracts must be sealed:
- Contracts above the value of £75K;

- New Framework Agreements;
- Where there is no consideration (i.e. money or money's worth) by one party (e.g. grant agreements, where the council is paying a voluntary sum to an organisation but the organisation is not giving anything in return); and,
- Other high risk Contracts (as advised by Legal Services) where a longer limitation period of 12 years is required.

6.6 Before a Contract can be awarded by Legal Services, a signed copy of the relevant Award Report must be provided by the designated decision maker. The signing or sealing of the Contract by Legal Services is simply affixing the common seal and does not indicate that legal advice has been sought or that Legal Services approve the Contract. A scanned copy of the signed Contract must be sent to Strategic Procurement to allow for inclusion in the Contracts Register

6.6 Contract Award Notices must be placed in Contracts Finder and Find a Tender Service in accordance with Regulations. The publication of Notices will be undertaken by Strategic Procurement.

6.7 All Bidders should be informed of the outcome of a procurement process as soon as possible and at the same time. Unsuccessful Bidders should be provided with feedback on their submission. In a two-stage process they should be informed when they are eliminated from the process and advised of the reasons why they did not meet the standard to be shortlisted.

6.8 For ITTs above Regulation Threshold, where the evaluation criteria is most advantageous tender, then unsuccessful Bidders should be advised of their score against each criteria and weighted marks, the relative strengths and weaknesses of their proposal and the total score and price of the winning Bidder, in accordance with Regulations.

6.9 Information on the successful Bidder's proposal including the method of undertaking the work or a breakdown of the price should not be provided to unsuccessful Bidders. If there is any doubt advice should be sought from Strategic Procurement.

7 Supplier Questionnaire (SQ)

7.1 For Contracts above £50k, before awarding a Contract, the Procuring Officer needs to ascertain whether any of the mandatory or discretionary exclusions, as set out in the SQ apply. A Contract must not be awarded to a Provider if a mandatory exclusion applies. For Contracts below £50k, only the leading Bidder should be required to complete a SQ prior to Contract award. Any concerns relating to mandatory or discretionary exclusion criteria should be referred to Strategic Procurement.

7.3 In the event that a discretionary exclusion applies, then the Provider should be requested to submit an explanation which details actions taken to rectify the situation. The Head of Strategic Procurement will assess the Provider's explanation and determine whether the Provider should be excluded.

8 Exemptions

8.1 The CPRs ensure that the Council complies with its legal requirements and is fair and transparent with respect to how public money is spent. Only in exceptional

circumstances will approval be granted to do something different. Where this is needed an Exemption will be submitted by the Head of Service, reviewed by the Head of Strategic Procurement in consultation with Legal Services and approved in line with the Scheme of Delegation.

- 8.2 If the value of the Contract is greater than the Threshold for Works, Services and Supplies then approval must be sought from the Monitoring Officer, in consultation with the Head of Procurement and the Section 151 officer, to confirm that one of the exceptions within Regulations applies.
- 8.3 All Exemptions from these rules must be recorded using the Exemption Form and approved before entering into a Contract with a supplier.
- 8.4 Circumstances where time is lost through inadequate forward planning or any unnecessary delays will not constitute a reason to issue an Exemption and Procuring Officers should make adequate preparation in advance of commencing the procurement exercise.
- 8.5 An Exemption will only be approved if it is for one of the following reasons;
 - 8.5.1 Where there is an existing corporate Contract, and a service decides they do not wish to use the corporate Contract, a business case to justify this must be demonstrated. This should be included in the Exemption Request.
 - 8.5.2 Where there is only one supplier within the market. Evidence that this is the case and what investigation has been done to try and find other suppliers must be demonstrated. This should be included in the Exemption Request.
 - 8.5.3 Where the procurement activity is grant funded or the Council is matching grant funding and the original grant has been given conditionally on the use of a named supplier, group of suppliers or particular framework. A copy of the grant agreement or other evidence should be attached to the Exemption.
 - 8.5.4 Where services need to be procured as a matter of extreme urgency - e.g. in response to an emergency situation - and there is insufficient time to advertise. Justification should be included in the Exemption.
 - 8.5.5 Where software is being procured that must be compatible with an existing ICT system, or where ongoing licencing and maintenance Contract is only available from one ICT supplier, and the cost of change is uneconomic. A business case justifying this should be included in the Exemption.
 - 8.5.6 Where it would be in the interests of the efficient management of the service and represent best value to the council. A business case justifying this should be attached to the exemption.
- 8.7 If an Exemption is not approved then a change to what is being proposed will be required to comply with the CPRs. If it is impossible to do this then a non-compliance will be recorded by Strategic Procurement and notified to the Audit team. An action plan to avoid a repeat occurrence will be required.
- 8.8 Where there are repeated non-compliances in a service team, the relevant Budget Holder will produce a plan to assess the situation and propose remedial action to be taken. This plan will be provided to Audit Committee.

- 8.9 A list of both approved Exemptions and any non-compliances will be reported to Audit Committee annually.

9 Contract Management, Variations and Extensions

- 9.1 As part of the pre-procurement activity, the officer who will be responsible for managing the Contract must be identified, known as the Contract Manager.
- 9.2 Reporting and monitoring processes appropriate to the size and nature of the Contract must be put in place to ensure that all obligations are fulfilled by the contracted parties. This includes the delivery of agreed Social Value targets.
- 9.3 All Contracts must be included and published on the Contracts Register maintained by Strategic Procurement in line with the Local Government Transparency Code 2014. This is a mandatory requirement and it is the responsibility of each Service to ensure that they have informed Strategic Procurement of the Contracts they are responsible for and provided them with the information necessary to update the Contracts Register accordingly.
- 9.4 Contracts may only be varied to implement minor changes which may include either increasing or decreasing the service or for services of a similar nature. Advice must be sought from Strategic Procurement and Legal Services.
- 9.5 Contracts can only be extended if options for extensions were included in the original Contract.
- 9.6 Contract variations and extensions must follow the same authorisation process as though they were new procurements. The relevant Thresholds for supplies, services, works and for the light touch regime, as defined in Regulations, apply.
- 9.7 If the value of the original Contract plus the sum of any extension or variation exceeds the Thresholds within these CPRs with the result that a different procurement process should have been used then an Exemption will need to be requested.

10 Social Care Contracts

- 10.1 It is recognised that either because of service user choice or the nature of the market for specialist placements, and the requirements of the Care Act 2014, that for some types of social care Contracts, competitive procurement processes cannot be undertaken. Only Contracts for the following have specific exclusions from these CPRs;

10.2 Residential Care

- 10.2.1 Residential Care placements are exempt from the full requirements of the CPRs. Sections 1,2,3,7 and 9 apply.
- 10.2.2 The Council will Contract with Residential Care Providers using a standard Contract. The Contract will set out a breakdown of the price that is set each year via the Council fee setting process. Any deviations from this standard Contract must be approved in advance by the relevant Integrated

Commissioning Strategic Lead officer who will consult with Legal and Strategic Procurement and liaise with the appropriate Executive Director.

10.2.3 If a weekly fee for an in-borough placement is higher than the standard fee then approval must be gained from the appropriate funding panel and/or relevant Team Manager, where they have delegated responsibility from the appropriate Executive Director, who will consult with the Integrated Commissioning Strategic Lead prior to agreeing the placement with the Provider.

10.2.4 For out of area placements for older people the fee per week must be the standard rate for the relevant local authority area. For placements where the fee per week is above this, approval must be gained from the appropriate funding panel and/or relevant Team Manager (where they have delegated responsibility from the appropriate Executive Director) who will consult with the Integrated Commissioning Strategic Lead prior to agreeing the placement with the Provider.

10.2.5 Where there is an emergency need and approval cannot practically be requested in advance (including by any on-call arrangements), then this should be notified to the relevant Team Manager and Integrated Commissioning Strategic Lead/ Contract & Commissioning Manager (Children's) as soon as possible and in all cases within 72 hours of the placement commencing.

10.2.6 In the event of the above occurring then the relevant Integrated Commissioning Strategic Lead/Contracts & Commissioning Manager should be advised as soon as practical.

10.3 **Social Care Frameworks**

10.3.1 Where a framework, Dynamic Purchasing System or alternative Flexible Purchasing System relating to Social Care is in place, e.g. foster care placements, children's residential care, learning disability and mental health packages, then the following will apply.

10.3.2 Where placements are made outside of the Framework Agreements, approval must be gained from the relevant Team Manager (where they have delegated responsibility from the appropriate Executive Director), who will consult with the Integrated Commissioning Strategic Lead/Contracts & Commissioning Manager prior to agreeing the placement with the Provider.

10.3.3 Prior to making an outside of Framework placement a breakdown of the price must be obtained from the Provider and value for money demonstrated. Advice should be sought from the relevant Integrated Commissioning Strategic Lead/Contracts & Commissioning Manager where the costs are more than the typical expected costs.

10.4 **Educational Placements**

10.4.1 Where the Council is required to pay for Education Placements these are generally required to be paid in advance and are not subject to competitive tendering. Prior to making a placement a breakdown of the price must be obtained from the Provider and value for money demonstrated.

10.4.2 Advice should be sought from the relevant Contracts & Commissioning Manager where the costs are significantly more than the typical expected costs.

11 Finance Leases excluding Land and Property

- 11.1 Where a Contract requires the Council to enter into a finance or lease agreement then advice should be sought from the relevant Finance Officer in advance.
- 11.2 In addition to the Contract Award approvals required as set out in the table in Section 3, finance and lease agreements must be approved by the Section 151 officer prior to signing.

12 Concessions and Revenue Earning Contracts

- 12.1 Any procurement of a Concession Contract should be carried out in accordance with these Rules
- 12.2 Prior to the Council awarding a Concession or entering into a revenue earning Contract, whether in its own right or with a commercial partner, approval of the commercial arrangements and Contract terms and conditions must be obtained from the Section 151 officer and from Legal Services.
- 12.3 Where the Concession or revenue has a value greater than the Threshold or has a significant risk profile (as assessed by the Section 151 officer and Legal Services) then approval is required from Cabinet prior to entering into the agreement.
- 12.4 Where the Council is a Bidder and submitting a proposal or tender in response to a contract opportunity then approval must be obtained from the relevant Executive Director and the Section 151 officer. Where the Contract has a value greater than the Threshold for Services and Supplies or has a significant risk profile (as assessed by the Section 151 officer and Legal Services) then approval is required from Cabinet prior to submitting the proposal or tender.
- 12.5 Advice from Legal Services must be sought prior to commencing any work on compiling a proposal or tender to determine if the Council has the power to enter into the Contract.

13 Disposal of Assets excluding Land and Property

- 13.1 The disposal of assets excluding land and property must comply with the following
 - A minimum of 3 competitive bids must be invited if the goods have an estimated value greater than £5,000 and up to £25,000.
 - A minimum of 4 sealed bids must be invited if the goods have an estimated value greater than £25,000. Alternatively, disposal can be by sale by auction. The Section 151 officer should be consulted in advance of the decision on disposal route.
 - The highest value unconditional bid received should be accepted unless in the view of the Section 151 officer a conditional bid offers better value to the Council

14 Disposal of Land and Property

- 14.1 Where land or premises are to be disposed of by competitive tender the procedure for receipt and opening tenders shall be as determined by the Executive Director of Place.

- 14.2 Tenders must contain a declaration as to whether the person submitting the tender is a Member or Officer of the Council or whether so related.
- 14.3 A tender may be accepted by the Executive Director of Place after consulting with the appropriate Cabinet Member subject to the following conditions being met:
- highest tender to be accepted except where the evaluation criteria are based upon Most Advantageous Tender in which case the tender that achieves the highest score in the assessment must be accepted;
 - where the evaluation criteria is based upon the highest tender the price represents the best price that could be reasonably obtained;
 - the tender accords with the "particulars/conditions of sale";
 - where the evaluation criteria are not based upon Most Advantageous Tender the tender does not include any non-financial considerations.
- 14.4 If any of the conditions in Rule 14.3 are not met or if the tender to be accepted is from a Member or Officer or a relative of such person the sale shall be determined by the Cabinet.

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Bury Council Procurement Guide

Advice & guidance to support Bury Council Contract Procedure
Rules

V1.0 September 2022

Overview

- What is Procurement?
- What are the procurement rules?
- The importance of procurement
- Procurement Checklist
- The Chest
- Calculating value of procurement and thresholds
- Routes to market & procurement journeys
- Procurement processes
- Exemptions, modification and extensions
- Social Value
- Roles & Responsibilities
- Real life example

What is Procurement?

- Procurement is essentially purchasing, buying and commissioning
- All companies procure, not just public sector
- Public procurement should be fair, transparent and proportionate
- What Local Authorities buy is very wide ranging
- Processes are put in place to ensure equality and to protect you



It is your responsibility to comply

What are the procurement rules?

- **Contract Procedure Rules** set out our rules and is part of the Council constitution
- **Procurement Guide** sets out our processes, guidance and advice
- **Procurement Strategy** provides the strategic overview and directions for procurement at Bury Council
- **Public Contract Regulations** set out the rules for above Threshold procurements
- Additional guidance/rules through **Procurement Policy Notes, Case Law**, other **Regulations** and best practice

What is the Procurement Guide?

This Procurement Guide is for navigating your way through the procurement rules and processes. It will help you procure in a compliant and efficient way that demonstrates value for money and generates social value for your communities.

This Procurement Guide contains guidance, tools, and advice to assist you through each procurement route and process. It does not replace the Contract Procedure Rules or any other constitutional rule or policy.

What is Excluded from CPR's?

- Contracts of employment for the appointment of individual members of staff.
- Grant funding agreements – for grant agreements the appropriate guidance must be followed
- Contracts where the Council is the supplier of Works, Goods and/or Services to third party organisations
- Contracts procured through frameworks let by other Contracting Authorities in compliance with Public Procurement legislation.
- Public to public contracts e.g. between Bury Council and another local authority
- The procurement of certain items that are not subject to the requirements Works, Supplies and Services procured from in-house companies which meet the criteria for the Teckal exemption e.g. Six Town Housing, Persona
- Contracts relating solely to the disposal or acquisition of securities;
- Contracts for the acquisition of an interest in land and property;
- Contracts for the appointment of Counsel or the appointment of experts for the purpose of legal, or potential legal proceedings by the SRO for Legal Services; and
- Any contracts specifically excluded by relevant legislation

Why is Procurement important?

Ensures that we deliver best value and value for money (External Audit implications)

Improves the delivery and cost effectiveness of quality of public services to citizens

Can find new models for service delivery

Savings can be channelled back into priority services

Deliver additional added value benefits to residents

Prevent financial loss to the Council

Support our reputation

Encourages more business to bid for our work

Part of the Council's constitution and you have an obligation to comply



Good procurement helps to protect you from allegations of fraud and corruption!

When procurement goes wrong...

- Legal Challenge
- Costs
- Time and resources
- Reputational
- Corruption
- Government Review
- Disciplinary
- Suppliers won't engage
- Professional indemnity insurance
- External audit

Before you start procurement



Before you start any Procurement, remember, good procurement is not just about buying well but is often about buying less or, indeed, **not buying at all**.

Always consider the following before starting a Procurement:

- **Have you considered alternatives?** There might be alternative solutions to what you want. Make sure you have considered what might be able to be delivered internally first.
- **Do you need to buy?** Consider whether there is a real need for what you want. You should procure only if necessary and not just because a budget is available.
- **Do you have the budget?** Consider whether you have the budget to buy what you want.
- **Do you have the Authority?** Check your Scheme of Delegation
- **Is there an existing arrangement in place already?** Check if your requirements can be met under an existing arrangement before you think about running a new procurement exercise. Using an existing arrangement saves you time and money.

'Starting a Procurement' Form

This is your starting point for all procurement

Template in place

Only asks for information that is needed

Why do we need this?

- Capture requirements
- Authority to procure
- Check key aspects of the procurement
- Auditable
- Details for the Contracts Register
- Transparency and FoI
- Ensure we all deliver what is agreed



Completion of Starting a Procurement' form is mandatory for all procurement above £10k

E-Procurement System

The Chest is Bury's e-procurement system www.the-chest.org.uk

You must use The Chest for all Request for Quotes and Tenders over £10k, including:

- Issue Request for Quote & Tender documents
- Issue clarifications
- All correspondence with Bidders
- Issue Contract Notices
- Tender Opening

The logo for 'The Chest' features the word 'The' in orange and 'Chest' in blue, both in a sans-serif font.

Training, advice and setting up of access to The Chest is available from Strategic Procurement

Calculating Value of Contract

Annual Value of Contract X Length of Contract (Years) = Value of Contract

Includes any contract extensions

Excludes VAT for below threshold

Includes VAT for above threshold

Includes all lots if you are establishing a framework

Concessions is same but total income to the Council



Purposefully breaking down a contract into smaller contracts is fraudulent

Thresholds

Value	Route to market	Advertising	Evaluation	Contract	Lead
Below £1k	One written quote Via price list or website	Bury suppliers, if possible	Lowest price	Purchasing card Purchase Order	Service
Below £10k	One written quote	Bury suppliers, if possible	Lowest price	Purchasing card Purchase Order	Service
£10-50k	Three written quotes	Bury suppliers, if possible If open advert then through The Chest and Contracts Finder	Lowest price or most advantageous	Purchase Order and: <ul style="list-style-type: none"> - Council standard contract - Framework contract - Bespoke contract drafted by Legal Services 	Service



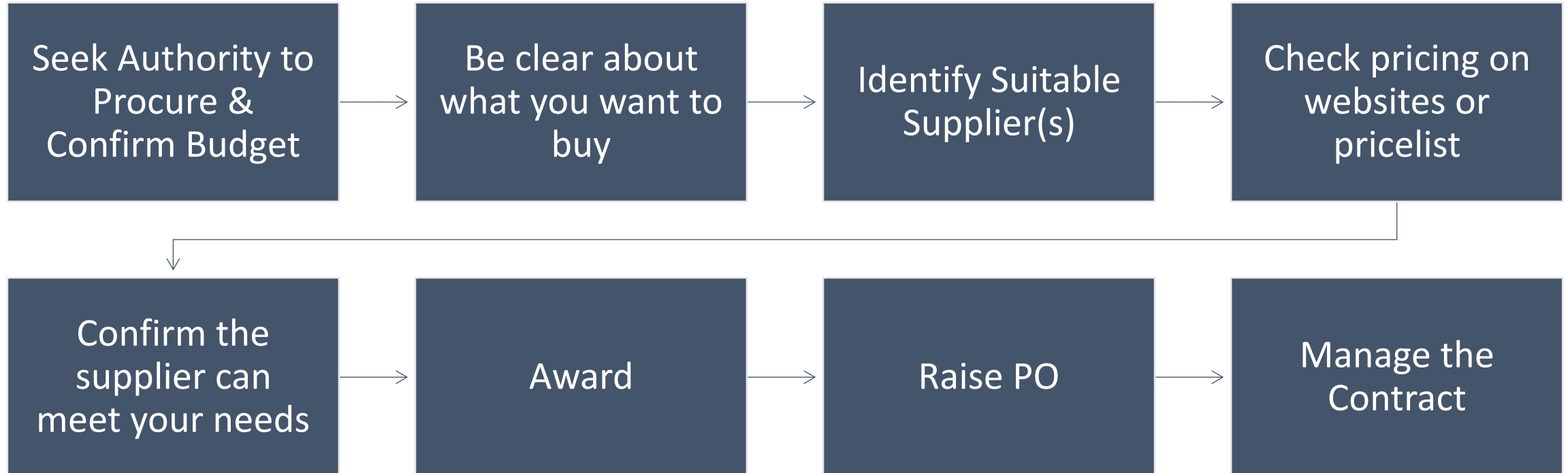
Thresholds

Value	Route to market	Advertising	Evaluation	Contract	Lead
£50k-Threshold	3 tenders	Bury suppliers, if possible If open advert then through The Chest and Contracts Finder	Most economically advantageous based on criteria published	Purchase Order and: <ul style="list-style-type: none"> Council standard contract Framework contract Bespoke contract drafted by Legal Services 	Strategic Procurement
Above Threshold	In line with Regulations	<ul style="list-style-type: none"> Council's e-tendering system Contracts Finder Website Find a Tender Service 	Most economically advantageous based on criteria published	Purchase Order and: <ul style="list-style-type: none"> Council standard contract Framework contract Bespoke contract drafted by Legal Services 	Strategic Procurement



Low Value Procurement Journey (Below £1k)

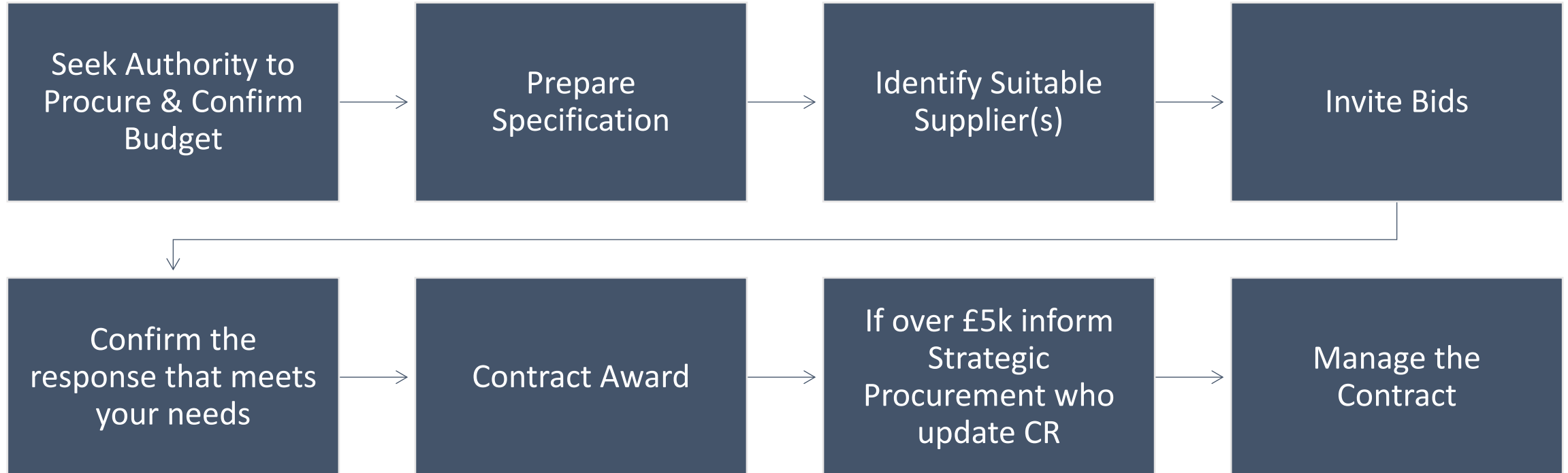
Typically take 1 day



Keep evidence of the process you have followed

Low Value Procurement Journey (Below £1-10k)

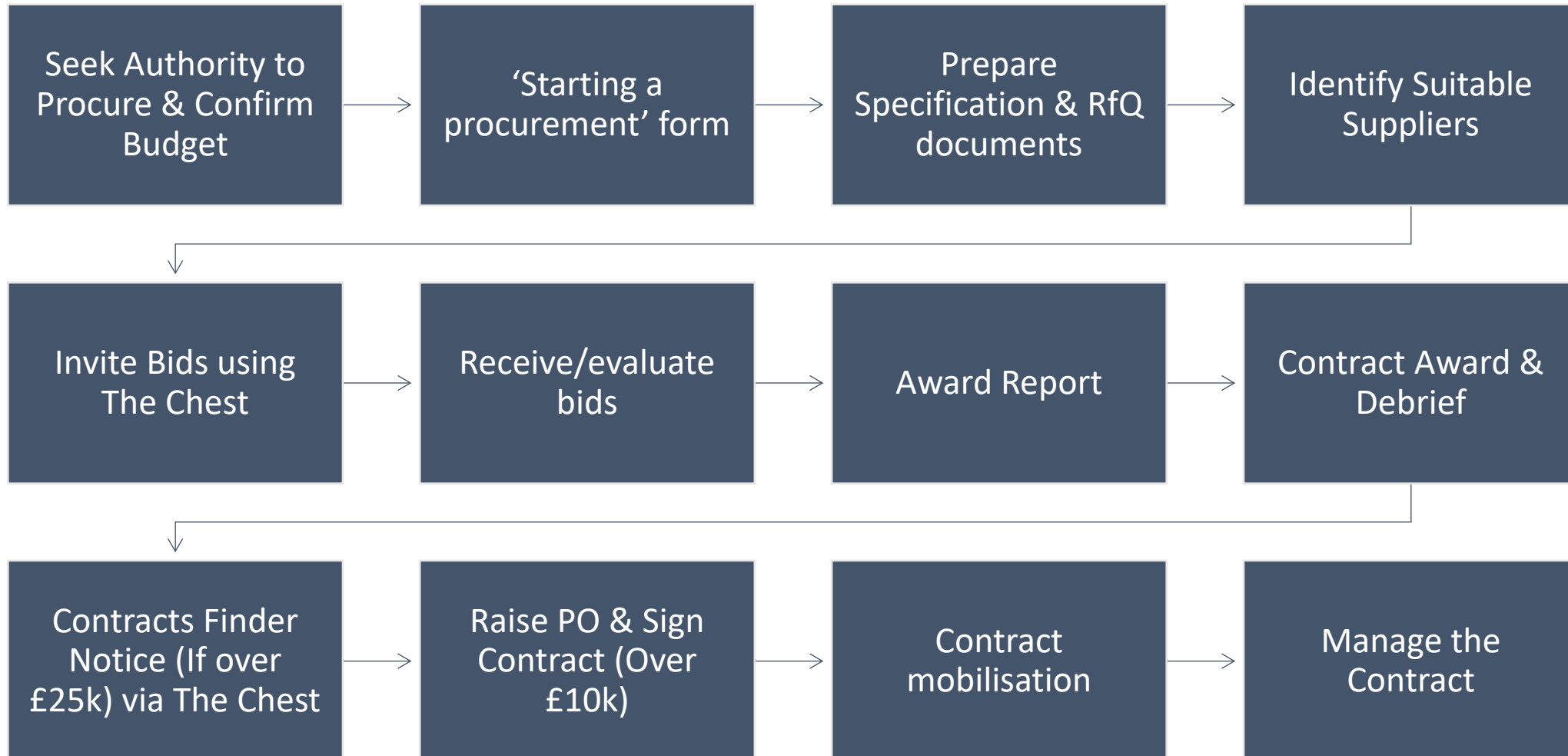
Typically take 2 -5 days



Keep evidence of the process you have followed

Low Value Procurement Journey (£10-50k, 3 quotes)

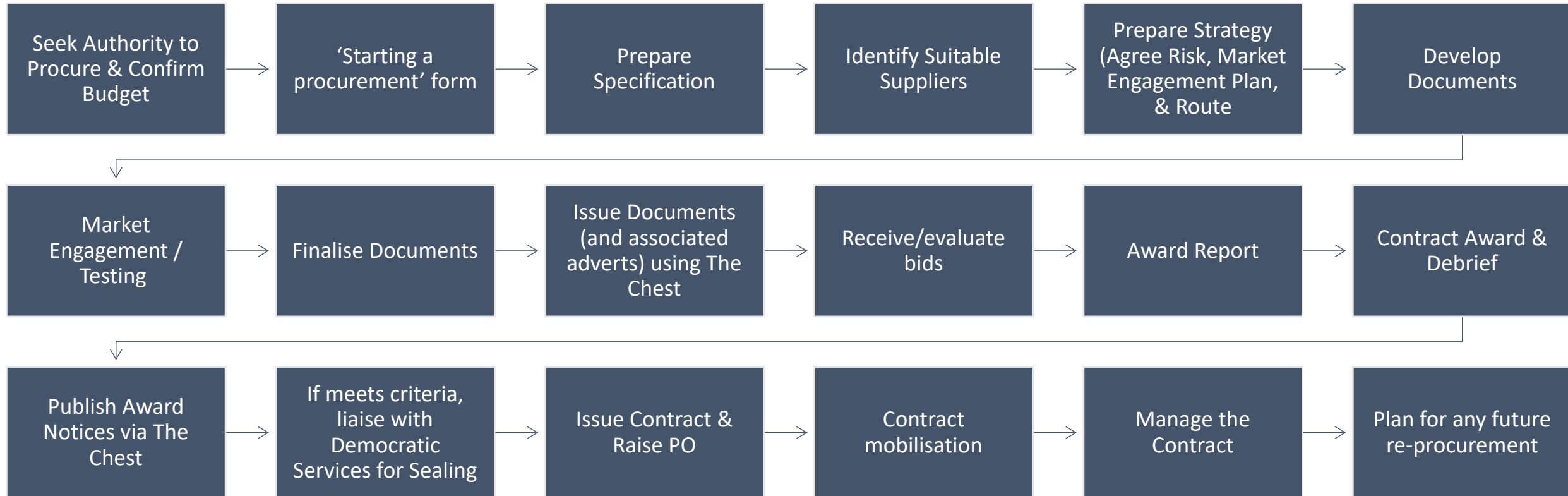
Typically take 2 -3 weeks



Sub-Threshold Procurement Journey (Over £50k – Threshold)

Page 60

**Typically take 3 weeks – 3 months,
depending on level of risk**



Route to Market: Above Threshold

- Above threshold – currently (inc VAT):
 - Supplies & Services £213,477
 - Works £5,336,937
 - Light Touch Regime £663,540
- Strategic Procurement must be involved and work with you to agree the process and route to market
- Very specific rules and processes to follow
- New Regulations are due Autumn 2022
- Can take 3-12 months depending on complexity and route to market



No further information provided as above threshold procurement should only be done in conjunction with Strategic Procurement and must be compliant with Regulations

Route to Market: Frameworks



The 'Starting a procurement' form to be completed for your call-off to ensure compliance & transparency



Strategic Procurement will work with you to check the framework is compliant



Must follow the rules of the Framework when you call-off from it including evaluation weightings, process and award



You can Call off Frameworks multiple times and is a very quick process.



Must still prove that it is value for money when making a call off from a framework.
There are sometimes more than one framework option available,



Commonly used frameworks:

Crown Commercial Services
YPO
ESPO
Bloom Consultancy
Construction Hub



If you want to set up a Framework Agreement then discuss with Strategic Procurement



When using external frameworks, the procurement risk sits with the Council, not the framework provider

Process: Why Do Market Engagement?

- Find out what the market thinks about our ideas, services choices, and approaches
- Identify if there is a more attractive way of packaging and scoping a future opportunity
- Gives us an idea of how suppliers / providers might approach the delivery of the service in question, or how they might address particular local circumstances that may impact on the services or proposals more generally.
- An early insight into the likely level of interest and potentially innovative, more cost effective, and new ways of doing things.
- We do not have to follow up the ideas we talk about. It is not a call to competition or part of the procurement, but can help us determine what we go out to the market with and when
- 2 way conversation – provide information but also ask for feedback

Process: Market Engagement Methods

Methods

- Use Expressions of Interest (EOI) document
- Research your market on the internet
- Meet the Buyer or market Engagement event
- Drop-in sessions
- Promote via The Chest, phonecalls, letters

How

- Set the scene with suppliers
- Provide your initial thoughts and ideas
- Be clear about what feedback you want
- Ask about barriers, potential issues
- Training and advice for suppliers
- Be fair and equitable to all



If unsure about what you should and shouldn't do when engaging with the market, then ask for advice from Strategic Procurement

Process: Specification

Means the outputs, outcomes, and the scope and nature of what you want to buy

It should be appropriate to what you are buying & capture all your requirements

You will need to write this as you are the subject matter expert for what you are buying

Suggest includes:

- Introduction
- Scope
- Background
- Requirements – overall, functional, technical, security, training etc
- Timescales and milestones
- Contract requirements including KPI's
- Skills and expertise

Process: Contract Drafting

- All Contracts below £10,000 may be awarded by a Council issued Purchase Order
- There are standard terms and conditions which should be used
- Where a framework is being used, the agreed framework terms and conditions should be used
- If bespoke terms and conditions are needed, then you must liaise with Legal Services prior to issuing the tender/quote.
- Check whether the contract will need sealing and build this into your timescales

Process: Evaluation Weightings

- Appropriate and proportionate
- Demonstrate value for money – Most Advantageous tender (MAT)
- Should not be 100% quality, unless agreed with Strategic Procurement
- Recommended Social Value weighting of at least 10% in all procurement activity of £50,000 or over.
- For frameworks, must follow framework guidance on evaluation weightings and processes

Process: Clarifications & Tender Opening

- All pre- and post-tender clarifications must be conducted in writing
- All clarifications and the written record of any meetings must be stored on The Chest.
- Where a meeting is required, there should be a minimum of two Officers of the Council in attendance
- Tender clarifications should be issued via The Chest
- Fair and transparent to all
- No paper tenders, must be done through The Chest
- Tender opening is electronic – via Strategic Procurement

Evaluation

Once bids have been received, it is important that a robust evaluation is carried out so that we can demonstrate:

- Which bid / solution offers the best value for our money
- That we make our decision in a way that isn't biased
- That the decision we make is fair, open and accountable
- The offer is meeting everything we need for the contract

The evaluation process can vary significantly in how long it takes to complete depending on the complexity of the requirements and responses, how many solutions were returned, how big the evaluation panel is.



To ensure a transparent evaluation process is undertaken, you must publish the evaluation criteria in the quotation / tender documents

Evaluation

Selection

Selection Criteria are a mix of the minimum acceptable criteria and standards you require.

They must be backwards looking at an organisation or its personnel's competency, capability, capacity, and past experience and performance on similar types of requirements.

They are pass / fail criteria and bidders are judged to either meet the criteria or not.

Award

Award Criteria includes both Quality and Price, and attribute a weighting to each. Both quality and price should be used in evaluations to determine the Most Advantageous Tender (MAT) – i.e. the solution that offers the best quality at the best price.

- **Quality** - These must be forwards looking at the organisations solution and how they intend to deliver your requirements.
- **Price** - Price at a basic level can include just the price to be paid for the delivery of your requirements. Price could also include evaluation on a whole life cycle costing model, which takes into account the costs attributable to you for the acquisition, use (including energy consumption, costs of greenhouse gas emissions), maintenance, and end of life costs (such as disposal, reuse, or recycling).

Evaluation: Methodology

To ensure a transparent evaluation process is undertaken, we publish the scoring methodologies in the quotation / tender documents.

- Scoring methodologies are explanations as to how you will score each question or criteria. It sets out what you are looking for in a response to award a certain score.
- Best practice is to score out of 4, with a methodology published for each score of 0 – 4.
- No half marks are allowed to be awarded.

New criteria or scoring methodologies **should never** be introduced once the deadline for submissions has passed. If you need to make changes, then you either need to communicate the changes to the bidders during the quotation/tender period and increase the submission deadline date by an appropriate period.

During the evaluation process it may become necessary to seek clarifications from bidders on their solution. Clarification of information submitted is acceptable, however, changes to submitted bids, or even changing your requirements is not allowed at this stage. The clarification process is purely to further understand any ambiguities or contradictions in a bidders solution.

It is important that only the documentation submitted by a bidder is used for the evaluation, whilst you may know about the company, and may be familiar with their products and solutions, you can only evaluate based on what they have submitted.

Every evaluation must be recorded at the time of evaluation. Such notes (this includes notes by individual evaluators and those from the moderation meeting) must include the score awarded and the reason why you awarded that score. Such reasons should reflect back to the criteria and scoring methodology.

Evaluation: Panel members

- At least one officer involved in the evaluation must have a sound knowledge and understanding of the requirement / problem to be addressed (the technical expert).
- For **procurements below £50k** the evaluation may be undertaken by a single individual, however, it is best practice for at least 2 officers are involved in the evaluation process. For **Sub-Threshold Procurement**, the evaluation should be undertaken by a minimum of 2 officers, but may also be by a wider evaluation panel. For **Above Threshold Procurement**, the evaluation should be undertaken by an evaluation panel of no less than 3 officers.
- Additional members of the evaluation panel can include other experts (for e.g. finance, legal, H&S, HR) as required. It is possible to include evaluation panel members who are not Council staff.
- Where an evaluator believes there is a conflict of interest in their involvement in the process, they should not proceed with the evaluation. They should find an alternative evaluator to take their place
- All evaluators must complete a Declaration of Interest

Process: Award of Contract

Award to the winning bidder

- Complete the Award Report with winning bidder details
- Award of any openly advertised RfQ or ITT in excess of £25,000 shall be published on Contracts Finder
- All Bidders must be notified simultaneously and in writing via The Chest
- Bidders should be informed of the relative advantages of the winning quotation(s) or tender(s) in comparison to their own whilst retaining confidentiality
- If receive a complaint, challenge or request for further information then discuss with Strategic Procurement immediately

Process: Contracts

Have you got the delegated Authority to sign the contract?

All Contracts below £10,000 may be awarded by a Council issued Purchase Order

Agreements equal to and exceeding £10,000 must be in writing

Standard terms and conditions should be used, or the agreed framework terms and conditions

If bespoke terms and conditions are needed, then you must liaise with democratic Services prior to issuing the tender/quote. The completed Procurement Checklist must also be provided.

All Agreements must be signed prior to commencement

Process: Contracts for Sealing

Sealing is carried out by Legal Services

Will require a fully completed Award Report

Sealing must take place when:

- Contracts above the key decision value (£500k) – unless agreed otherwise by Legal Services;
- New framework agreements;
- Where there is no consideration (i.e. money or money's worth) by one party (e.g. grant agreements, where the council is paying a voluntary sum to an organisation but the organisation is not giving anything in return); and,
- Other high risk contracts (as advised by Legal Services) where a longer limitation period of 12 years is required.

Process: Contract Management

All Contracts in excess of £5k must be published on the Council's Contracts Register

Procuring Officer is responsible for Contract Management, unless otherwise agreed

Document retention – make sure the contract is saved in shared folder!

You are responsible for reviewing, monitoring and evaluating the Agreement

If you don't proactively manage your contract then your contractor may not be delivering what has been agreed.

If there are issues with contractor performance and you haven't contract managed then taking action against the contractor is extremely difficult

Process: Contract Management

Contract management includes:

- Performance (against agreed KPIs, where relevant, including Social Value commitments)
- Compliance with specification and contract
- Cost – make sure they invoice the contracted prices
- Any Best Value duties
- Continuous Improvement
- User satisfaction
- Risk management



You must pro-actively plan any re-procurement, renewals, modifications, extensions etc

Lessons Learnt

The conclusion of any contract is the ideal time to review how well the contract performed. You should explore lessons learned: these can inform future contract terms or strategies. You should determine what worked well and any areas that could be improved.

All those involved with the bid and/or contract, both in your organisation and the bidder organisations, can be asked for feedback. This could include a variety of roles e.g. contract managers, procurement officers, logistics, estate managers, etc

Any lessons learnt throughout any stage of the procurement and contract management should be fed back to Strategic Procurement who can then review to see whether processes, procedures or advice needs updating.

This Procurement Handbook will be updated regularly

Exemptions

Exemption used when Council Standing Orders have not or cannot be complied with

- Absolute Last Resort
- No Guarantee it will be accepted
- Can take time to get approvals
- May only exempt for a period to run a procurement process
- Require sign off from legal & finance
- Require review from procurement
- You must use the Exemption Form



Lack of time or poor planning is generally not a valid reason for an exemption

Modifications

Changes to the contract

- Require sign off from legal & finance
- Require review from procurement

Allows for transparency

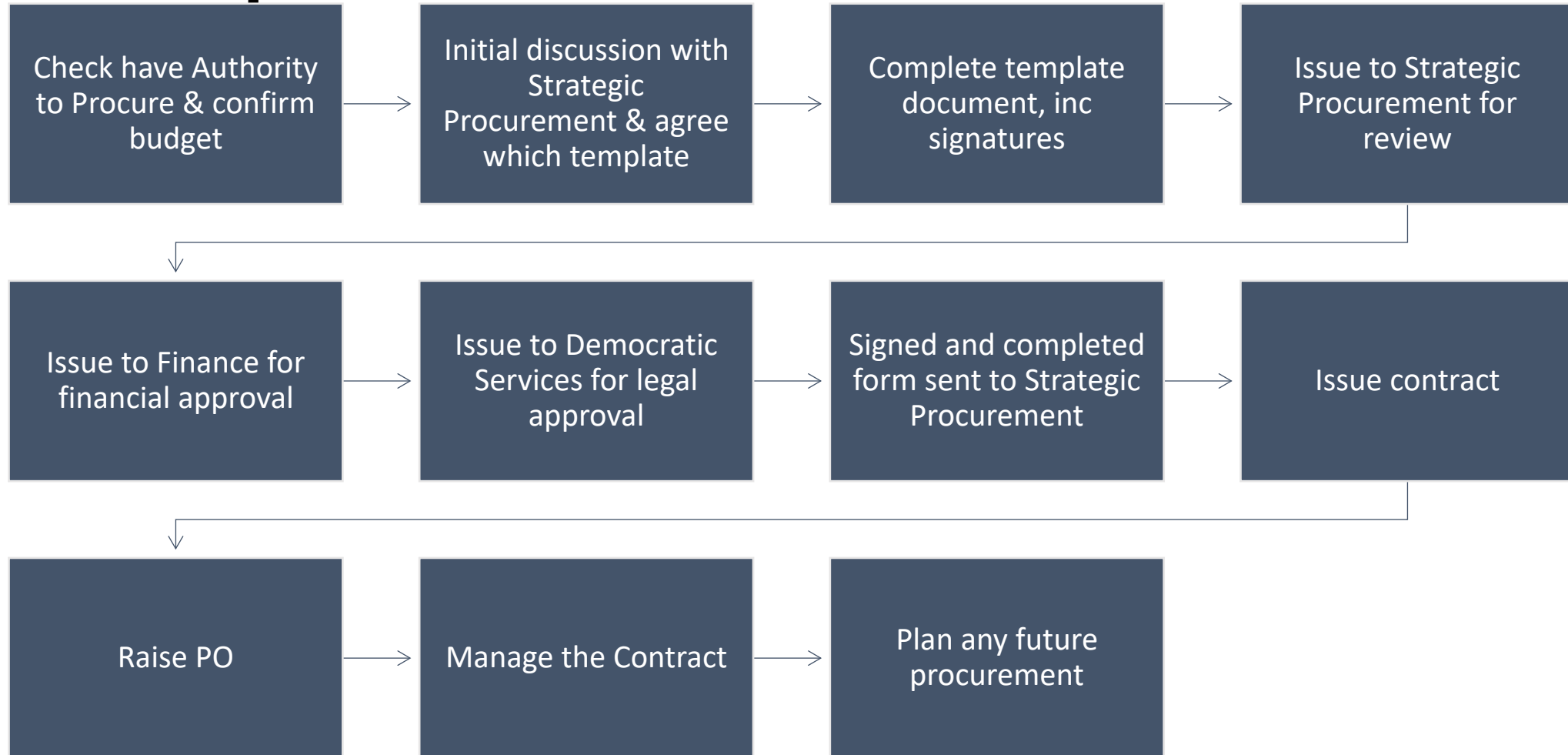
Must update the contract

Includes reductions in scope as well as increases

Use the Modification Form

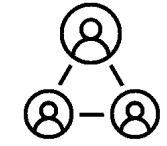
Inform Strategic Procurement so CR can be updated

Exemption & Extension Journey



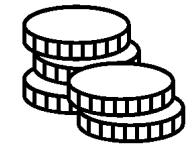
Social Value

Social Value weighting of at least 10% in all procurement activity over £50k



Social

'Social Value is considered as the **wider benefit** gained by the **local community, businesses and the environment** through the **better spending of public money.**'



Economic

Should be relevant, proportionate, achievable, simple and measurable



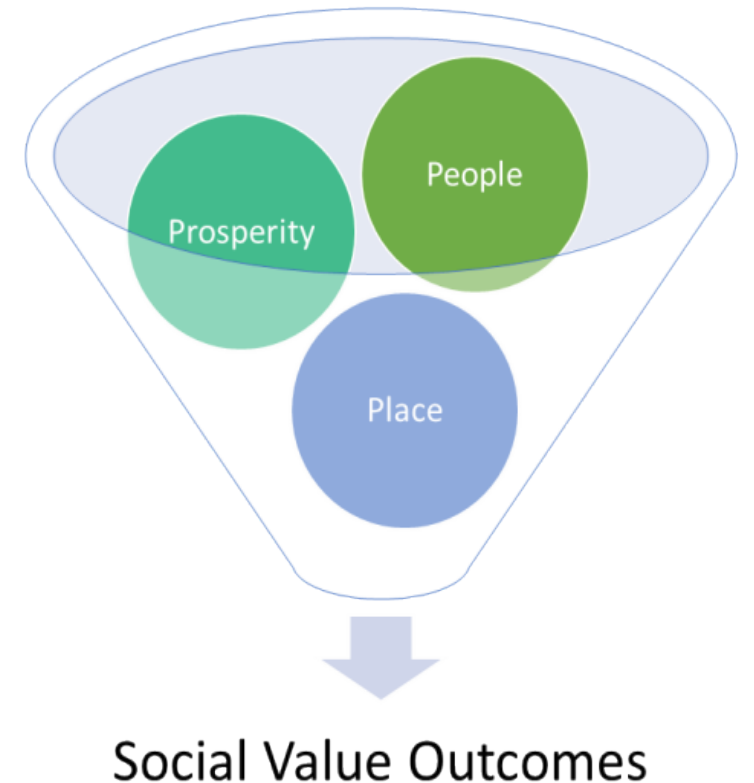
Environmental

Social Value

What Social Value does Bury want?

1. Links to Lets Do It
2. Service delivery plans

- What will the contractor deliver?
- How will they deliver it?
- Include in contract and as a KPI
- You must manage and monitor performance



Social Value: Some Examples

Social	Economic	Environmental
<ul style="list-style-type: none"> • Initiatives to reduce crime • Initiatives to reduce homelessness • Donations to local community projects • Volunteering hours to local community projects • School visits • Training • Work placements 	<ul style="list-style-type: none"> • Use of local supply chain • Voluntary hours to support VCSE's • Business advice • Staff wellbeing • Real Living Wage • Payment of invoices within 30 days • Local employment • Apprenticeships 	<ul style="list-style-type: none"> • De-carbonisation • Programme to achieve net-zero • Energy efficiency measures • Use of renewables • Recycling initiatives • Re-forestation initiatives • Waste management • Water saving • Zero emission vehicles • Single use plastic reductions

Real Living Wage

New Contracts:

All Bury contracts with in-scope workers include payment of the RLW

BURY
LET'S Do It!

- *Commitment:*
- *"We will ensure that the Real Living Wage is embedded within our procurement processes and commended to bidders through our ITTs."*

In-scope:

- **ADD**
- Included in 'Starting a Procurement' form
- Questions added to the Supplier Questionnaire
- ITT and RFQ templates include clause (Section 3 3.5)

Information Governance

To Update

Audit

You need to ensure that all your documents are accessible in case of an internal or external audit. In summary:

Bury Council Files	The Chest
Starting a Procurement form	ITT/RfQ
Contract Register	Terms and conditions
Completed exemptions & modification forms	All bidder correspondence
Templates	Evaluation notes and matrices
Strategy, Handbook and CPR's	Contract award
Training materials	Contract notices
	Contract management information

Roles & Responsibilities - You

Completion Starting a procurement form and Award Report

Completion of declaration of interest

Ensure fair, open, and transparent procedures are followed

Ensure all appropriate governance is in place and followed and obtaining approvals to procure

Provide the appropriate technical expertise for the required supplies, works, or services

Drafting a compliant specification and evaluation criteria

Considering Social Value requirements

Drafting responses to bidder queries

Evaluation and moderation in line with best practice

Drafting feedback to suppliers

Contract monitoring and management

Managing Exemption, Modification and Extension processes

Planning and preparing

Asking for help and advice when needed

Undertake relevant training

Strategic Procurement Support

- Help and advice
- Manage the Contracts Register
- Keep Procurement Guide up to date
- Review exemptions and modifications
- Template documents
- Review of the Contract Procedure Rules
- Terms & Conditions templates
- Training
- The Chest maintenance
- Publication of notices

Key Messages

- Read and understand the new Contract Procedure Rules
- Know what contracts you have in place and ensure they are on Contracts Register
- Plan ahead for your procurements
- Engage early with Strategic Procurement
- Fair, open and transparent
- Significant implications if it goes wrong
- Your obligation to comply
- Ask for help if unsure

Contact/Further Info

If you are unsure about any aspects of the procurement process or procedures, then please contact Strategic Procurement

CorporateProcurement@bury.gov.uk

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Classification	Item No.
Open	

Meeting:	Standards Committee
Meeting date:	15 November 2022
Title of report:	Councillor Attendance
Report by:	Philippa Braithwaite, Principal Democratic Services Officer
Decision Type:	Non-Key
Ward(s) to which report relates	Not applicable

Executive Summary:

This report sets out all Councillor attendance at public Committee meetings from the beginning of the municipal year (4th May 2022) until the end of October 2022.

This summary only includes public facing meetings; it does not include attendance at private meetings (i.e. Democratic Arrangements Forum, or Joint Commissioning Committees). Attendance summaries for all meetings (including private meetings) are provided to Groups informally on a monthly basis.

Recommendation(s)

That Councillor attendance at meetings be noted.

Attendance Statistics

Councillor	Expected	Present	In attendance	Apologies sent	Absences
Ayesha Arif	8	8	0	0	0
Shahbaz Arif	8	7	0	0	1
Noel Bayley	9	8	0	1	0
Russell Bernstein	23	23	3	0	0
Donald Berry	13	13	1	0	0
Carol Birchmore	13	13	2	0	0
Ciaron Boles	11	10	0	1	0
Andrea Booth	10	8	1	2	0
Nathan Boroda	11	9	0	2	0

Councillor	Expected	Present	In attendance	Apologies sent	Absences
Roger Brown	10	10	1	0	0
Clare Cummins	13	9	0	4	0
Liam James Dean	8	8	0	0	0
Spencer Donnelly	8	8	1	0	0
Des Duncalfe	10	10	0	0	0
Ummrana Farooq	6	5	0	1	0
Elizabeth FitzGerald	8	8	0	0	0
Nikki Frith	7	5	0	2	0
Iain Gartside	5	4	0	1	0
Richard Gold	9	8	0	1	0
Debra Green	11	8	0	3	0
Joan Grimshaw	28	23	0	5	0
Shaheena Haroon	3	3	0	0	0
Jackie Harris	11	9	1	2	0
Martin Hayes	13	10	0	3	0
Khalid Hussain	11	11	1	0	0
Nicholas Jones	8	7	0	1	0
Jo Lancaster	9	8	1	0	0
Glyn Marsden	11	11	1	0	0
James Mason	3	2	1	1	0
Luis McBriar	9	7	0	2	0
Gavin McGill	15	15	0	0	0
Charlotte Morris	9	8	0	1	0
Elliot Moss	14	11	0	3	0
Eamonn O'Brien	14	11	0	3	0
Kevin Peel	8	4	0	4	0
Tom Pilkington	12	9	1	3	0
Alan Quinn	9	8	1	1	0
Debbie Quinn	11	10	0	1	0
Tahir Rafiq	23	22	0	1	0
Imran Rizvi	8	7	1	1	0
Jack Rydeheard	11	11	2	0	0
Lucy Smith	16	10	0	5	1
Mike Smith	8	6	1	2	0
Tamoor Tariq	28	25	0	3	0
Cristina Tegolo	3	3	0	0	0
Sean Thorpe	11	11	0	0	0
Dene Vernon	13	11	1	2	0
Sandra Walmsley	8	7	0	1	0
Mary Walsh	32	32	0	0	0
Mary Whitby	8	6	0	2	0
Yvonne Wright	3	1	0	2	0

Explanation of the statistics counts

- **Expected** - The number of meetings that the councillor was expected to attend, whether in person or virtually, in their capacity as member of that committee.
- **Present** - The number of meetings that the councillor attended in their capacity as member of that committee.
- **In attendance** - The number of meetings that the councillor attended in a capacity other than committee member, for example a voluntary attendance out of personal interest for a topic being discussed.
- **Apologies sent** – Meetings not attended, where the Councillor is a member of the committee, where apologies were submitted.
- **Absent** - Meetings not attended, where the Councillor is a member of the committee, where apologies were not submitted.

Community impact/links with Community Strategy

Equality Impact and considerations:

An equalities analysis is not required.

Assessment of Risk:

Councillor non-attendance can result in inquorate meetings. Regular reporting of attendance statistics mitigates this risk by giving early notice to Councillors of possible concerns and allowing early resolution.

Consultation:

N/A

Legal Implications:

There are no legal implications.

Financial Implications:

There are no financial implications.

Report Author and Contact Details:

Philippa Braithwaite, Principal Democratic Services Officer
Democratic Services
p.braithwaite@bury.gov.uk

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning

LET'S DEVELOP



**BURY COUNCIL'S MEMBER
DEVELOPMENT OFFER
2022-2023**

Member Name:

Year:

Political Group

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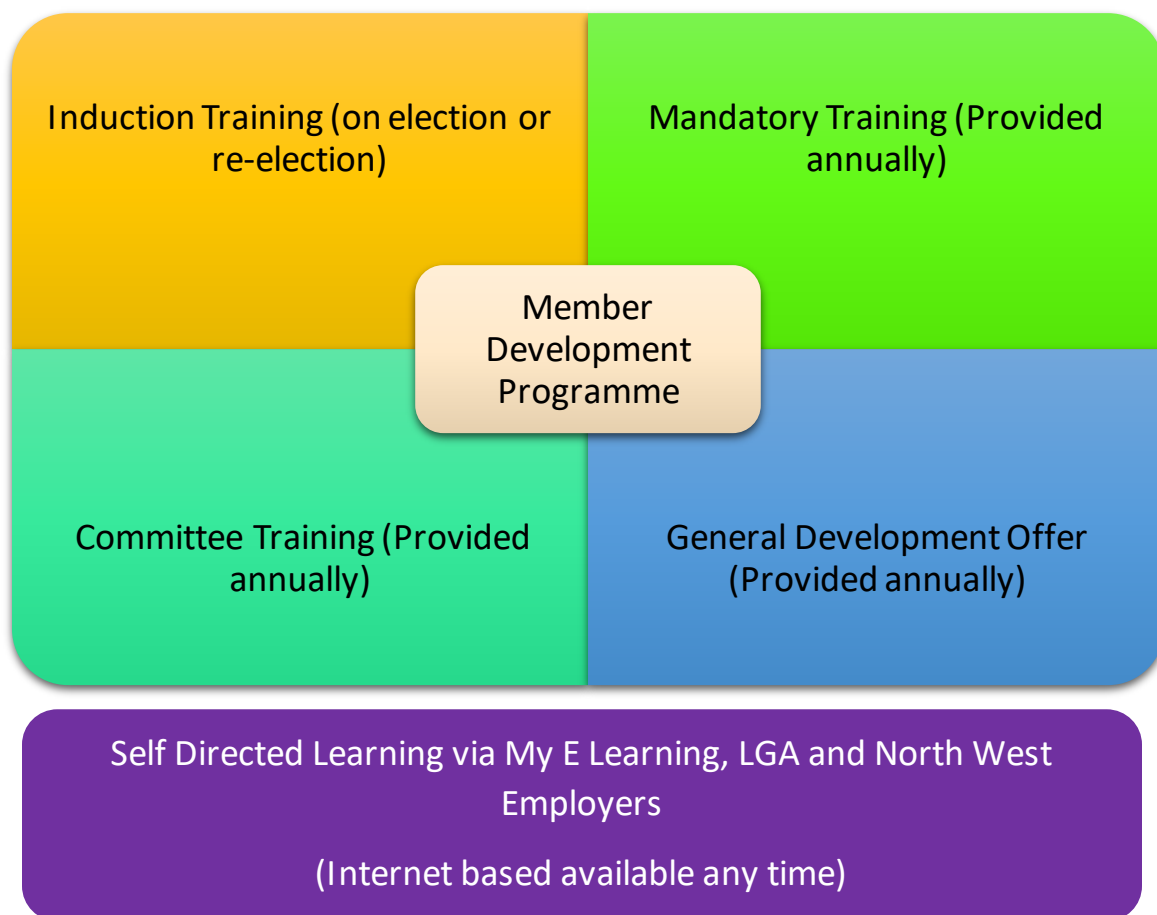
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Introduction

In enabling Elected Members to undertake their roles, Democratic Services, supported by the Executive Team want to ensure all Councillors are supported to;

- represent the views of their communities
- improve and shape services for the future
- be outstanding community leaders and,
- be advocates for the Council.

The Council provides training support in the following ways:



This programme provides details of the whole training offer to elected members.

Induction

All members on election (newly elected or re-elected) will be invited to attend a Councillor Induction session. Newly elected members will be asked to complete mandatory training modules, see below.

Workshop/training events will be scheduled, and elected members will be provided with details of dates, times and venues. Training may also be scheduled throughout the municipal year as needs are identified or at Members' request. Placeholders for training will be held in the meetings timetable agreed in March for commencement in May.

Below is an outline of what to expect in each cycle of the year.

Workshop / Training Events

Approx Timescale	Mandatory / Optional	Session
Cycle 1 May - June	Mandatory	Read through and complete paperwork as set out in the member handbook
	Mandatory	Sign Register of Interests and Acceptance of Office
	Optional	Attend member induction
	Optional	Introduction to the Council Constitution
	Optional	Introduction to Council Directorates
	Mandatory	Code of Conduct
	Mandatory	Safeguarding & Sexual Exploitation
	Optional	Service Planning & Finance
	Optional	Council Finance and Budgeting
	Mandatory	Attend core training for any Committee's or meeting you may now be a member on including: Planning Licensing HRA Scrutiny Audit
	Optional	Attend Mock Council
Cycle 2 July-Sept	Optional	Attend a Member Casework Briefing
	Optional	Attend Microsoft Training (Microsoft 365)
	Optional	Attend a Finance – General Overview Session

	Optional	Admissions Training/ Briefing
Cycle 3 Sept- Oct	Mandatory	Inclusion Training
	Optional	RSPH Course
	Mandatory	Information Governance Training
Cycle 4 Nov-Dec	Mandatory	Election/Purdah Training
Cycle 5 Jan-Feb	Optional	Attend Finance – Budget Overview
Cycle 6 March- May		

Online Learning

The following online learning modules are available to support Councillor induction, further details on how to access e-learning is available in the online/self-directed learning section of this handbook.

Approx Timescale	Duration	Mandatory / Optional	Session
Cycle 1 May - June	30 Minutes	Mandatory	Corporate Parenting
	180 Minutes	Mandatory	Bury Council UK GDPR Suite
	75 Minutes	Mandatory	Equality and Diversity Training
	60 Minutes	Optional	Corporate Induction Bury Council This course is intended to be completed by all new staff who join Bury Council.
	15 Minutes	Mandatory	Safeguarding Adults at Risk (Bury Council)
Cycle 2 July-Sept	Varied	Optional	Safeguarding courses: https://courses.buryscbglobal.net/AvailableCoursesList.asp
	30 Minutes	Mandatory	Personal Safety: Lone Worker

Cycle 3 Sept/Oct	15 Minutes	Mandatory	Accessible Information Standard - Bury Council
	15 Minutes	Optional	An Introduction To Civil Contingencies For Elected Members
Cycle 4 Nov-Dec	15 Minutes	Optional	The Bury Directory
	90 Minutes	Mandatory	Care Act - Introduction and Overview
	15 Minutes	Optional	Autism Awareness - Bury Council
Cycle 5 Jan-Feb	15 Minutes	Optional	Head in the sand? - Tackling difficult conversations
	45 Minutes	Optional	LGBT Awareness
Cycle 6 March-May			

For Member Development Support at all times:

In house Member Support	Support available to all Elected Members through Democratic Services Mayoral and Member Officer
Online Training	https://melearning.university/course_centre on the Councils intranet where hundreds of courses can be accessed.

The logo for Bury Local Authority, featuring the word "BURY" in large, bold, yellow capital letters above the phrase "LET'S Do It!" in smaller, white capital letters. The text is contained within a dark blue speech bubble shape that points towards the bottom right.

BURY
LET'S Do It!

Our vision

To stand out as a place that is achieving faster economic growth than the national average and lower than national average levels of deprivation.

LET's do it! vision and values

To stand out as a place that is achieving faster economic growth than the national average and lower than national average levels of deprivation.

- **Local** – community approach to engaging with people how and where they live, to agree priorities and collaborate on delivery.
- **Enterprise** – to drive inclusive economic growth through our business community; the education and skills sector; spatial development plans and spirit of our people.
- **Together** – working with communities through joined-up public services, inclusive decision-making and digital connectivity.
- **Strengths** – Recognising the assets and strengths of communities and targeting resources at areas of greatest need.

The Council's Let's Do It Principles compliment the training offer and the Member support provided to all Elected Members.

Let's Do It identifies 5 key roles for the Ward Councillor:

The role of the Ward Councillor

- **Convenor**
 - Bringing groups together and encouraging collaboration, especially to drive diversity of representation
- **Intelligence sharer**
 - Share information to enable others to get stuff done
- **Supporter**
 - Encourage people to contribute & do what matters most to them
- **Questioner**
 - Support people to ask about what matters to them and get answers that will make a difference in their communities
- **Bridge builder**
 - A bridge between the council, community voices and other organisations to build relationships and deliver results

Mandatory Training

The following training is mandatory for all elected members and is monitored by Group Leaders, Democratic Services and the Member Development Group.

When	Type of Training	Session
New Members on induction and refresher training every 2 years	As part of member induction or as a workshop	Code of Conduct
Every year	Workshop or E-learning	Safeguarding & Sexual Exploitation
Every year	E-Learning or in person	Corporate Parenting
Every year	E-Learning or in person	Equality, Inclusion and Diversity

Regulatory Training

Elected Members must complete training as a Member of a regulatory committee, this training must be completed in advance of attendance at their first meeting. Training must be completed annually.

Session	Who	Year 1	Year 2, 3, 4
Planning Committee Training	Appointed members and/or substitute members	Workshop or E-learning	Competency Quiz
Regulation & Review Committee Training (including panels)	Appointed members and/or substitute members	Workshop or E-learning	Competency Quiz
Licensing Committee Training (including panels)	Appointed members and/or substitute members	Workshop or E-learning	Competency Quiz
Audit Committee	Appointed Members	Workshop	Competency Quiz
Standards Committee	Appointed Members	Training led by the Monitoring Officer prior to first meeting	Attend annually

Annual General Member Development Offer

This programme offers general development and training to support Councillors in their roles. The Cabinet Member for Corporate Affairs and HR will lead on this work and progress will be reported to Group Leaders and their representatives at meetings of the Member Development Group.

2022/23 Member Development Programme includes:

- Sessions to support the development of effective Scrutiny
- Committee specific training to support the delivery of committee work programmes
- ICT familiarisation to support elected members with new ICT initiatives
- Leadership development programmes tailored to the needs of Cabinet and senior political roles. Programmes to be identified according to need and will include internal and external training workshops.

Training sessions will be scheduled throughout the year avoiding committee dates/times.

Online/Self Directed Learning

In addition to the above programmes Elected Member have access to various online and self-study tools to support their personal development.

What's Available:

Bury Council My E-Learning – This is the Council's dedicated online learning platform where you can get access to a range of e-learning modules written specifically for Councillors and Employees.

All Councillors are registered with Bury Council E-Learning and your login details can be obtained by emailing psd@bury.gov.uk or calling 0161 253 6808

You can access Bury Council E-Learning via any computer with internet access via this link:

[Login - Bury Council e-Learning \(melearning.university\)](https://buryc.melearning.university/) or <https://buryc.melearning.university/user/login>.

Further guidance on accessing Bury Council E-Learning is at the end of this section.

LGA Councillor Development Tools – The Local Government Association have developed a range of e-learning modules and workbooks specifically for Elected Members.

These can be accessed free via:

[New councillor hub | Local Government Association](https://www.local.gov.uk/our-support/leadership-workforce-and-communications/new-councillor-hub) or www.local.gov.uk/our-support/leadership-workforce-and-communications/new-councillor-hub.

You need to create an account to access the courses by completing this form: [Create new account | Local Government Association](https://www.local.gov.uk/user/register) or www.local.gov.uk/user/register. Further guidance on how to access this service is available at the end of this section.

The LGA also offer Highlighting Political Leadership events and programmes which Councillors are encouraged to attend if they are in or may take up leadership positions.

Visit the LGA website for the latest Highlighting Political Leadership events and programmes <https://www.local.gov.uk/our-support/highlighting-political-leadership>

North West Employer Development Tools

As a member of North West Employers, you have access to a range of resources, information, guides and webinars that you can use.

North West Employers offer a Charter for Elected Member Development along with supporting documents on developments and self assessment.

Information on resources available can be found here:

[Resources - NW Employers](#) or <https://nwemployers.org.uk/resources/>

Bury Council's E-Learning

This learning system can be accessed and used by Bury Council employees and Councillors. The link below, provides access to the modules available to Bury Council staff and Elected Members https://buryc.melearning.university/course_centre

Log into the site and search the course catalogue. Some modules have been authored in-house, some sourced from partner organisations.

Resource	Where	Primary Audience
Introduction To Islam - Bury Council	Course centre - Bury Council e-Learning (melearning.university)	Elected Members & Employees
An Introduction To Civil Contingencies		Employees
An Introduction To Civil Contingencies For Elected Members		Elected Members
JESIP Awareness		Employees
Managing Conflict - Bury Council		Elected Members & Employees
Transgender Awareness - Bury Council		Elected Members & Employees
Waste Collection E-Learning		Elected Members & Employees
Corporate Parenting - Bury Council		Elected Members & Employees
We Need To Talk About Suicide		Elected Members & Employees
Minute Taking		Employees
Embracing Change - Bury Council		Employees
Recycle For Greater Manchester		Employees
A Guide To Bury Virtual School		Elected Members & Employees
The Armed Forces Covenant For Front Line Workers		Elected Members & Employees
Employee Review Briefing For Managers 2021		Employees
Outcome Based Management - Bury Council		Employees
Corporate Induction (V8 Bury Council)		Elected Members & Employees
Constructive Feedback (Bury Council)		Employees
Improve Your Employability (Bury Council)		Employees

Jewish Cultural Awareness (Bury Council)		Elected Members & Employees
Climate Change - Bury Council		Elected Members & Employees
Questioning Techniques and Active Listening (Bury Council)		Elected Members & Employees
Interview Skills (Bury Council)		Elected Members & Employees
Record Keeping (Bury Council)		Employees
Safeguarding Adults at Risk (Bury Council)		Elected Members & Employees
E-Mail Stress (Bury Council)		Employees
Making Every Contact Count - Introduction To Behaviour Change - Bury Council		Employees
Accessible Information Standard - Bury Council		Elected Members & Employees
Beating Stress and Building Resilience (Bury Council)		Employees
Quick Mail Merge Using Word 2003 - Bury Council		Employees
Confident and Effective Performance Management (Bury Council)		Employees
Unit4 Requisitioner		Employees
Unit4 Authoriser		Employees
The Bury Directory		Elected Members & Employees
How To Write Job Descriptions - Bury Council		Employees
Driving For Work - Bury Council		Employees
Dementia Friends - Bury Council		Elected Members & Employees
Autism Awareness - Bury Council		Elected Members & Employees
Care Act - Introduction and Overview		Elected Members & Employees
Assessment and Approval of Foster Carers		Employees
Mental Health, Dementia and Learning Disability (Awareness) - for Health and Social Care		Employees
Care Act - Care and Support Planning		Employees
Child Sexual Exploitation - Level 1		Employees
Coaching Skills		Elected Members & Employees

Common Assessment Framework (CAF or Early Help)		Employees
Deprivation of Liberty Safeguards (DoLS)		Employees
Developing Team Trust		Employees
Diabetes (Awareness)		Elected Members & Employees
Effective Communication with Children and Families		Employees
Emotional Abuse		Employees
Online Safety - Risks to Children		Employees
Fluids and Nutrition - for Health and Social Care		Employees
Framework for the Assessment of Children and their Families		Employees
Growing your Team to High Performance		Employees
Honour-Based Violence and Forced Marriage		Employees
Understanding Child Development		Employees
Infection, Prevention and Control - for Health and Social Care		Employees
Influencing to Win Win		Employees
Information Sharing and Consent - for People Working with Children		Employees
Lead Professional		Employees
Leading a Meeting		Elected Members & Employees
Medication Awareness and Safe Handling of Medicines		Employees
Mental Capacity Act		Elected Members & Employees
Multi-Agency Working		Employees
NHS Continuing Healthcare		Employees
Palliative Care and End of Life Care		Employees
Physical Abuse		Employees
Privacy and Dignity - for Health and Social Care		Employees
Private Fostering		Employees
Reablement		Employees
Safeguarding Against Radicalisation - The Prevent Duty		Elected Members & Employees
Safeguarding Children - Level 1		Employees

Safeguarding Children with Disabilities		Employees
Setting Performance Expectations		Employees
Solving Problems: Definition to Options		Employees
Thinking Creatively		Employees
Work in a Person Centred Way - for Health and Social Care		Employees
Teenage Pregnancy		Employees
Eating Disorders		Employees
Epilepsy Awareness		Employees
Dementia Awareness		Elected Members & Employees
Understand your Role - for Health and Social Care		Employees
Duty of Care - for Health and Social Care		Employees
Equality and Diversity - for Health and Social Care		Employees
Effective Communication - for Health and Social Care		Employees
Safeguarding Adults (Awareness) - for Health and Social Care		Employees
Basic Life Support (BLS) - for Health and Social Care		Employees
Handling Information - for Health and Social Care		Employees
Personal Safety: Lone Worker		Elected Members & Employees
Hidden Harm: Parental Substance Misuse, Parental Mental Ill-Health and Domestic Abuse		Employees
Fire Safety Awareness		Elected Members & Employees
Food Safety and Hygiene Level 2		Employees
Safeguarding Children in Sport		Employees
Parkinson's Disease Awareness		Elected Members & Employees
Falls and Fracture Prevention in the Elderly		Employees
Stroke Awareness		Employees
Loss and Bereavement		Employees
Safer Recruitment		Employees
Control of Substances Hazardous to Health (COSHH)		Employees

Food Safety and Hygiene Essentials		Employees
Handling Violence and Aggression at Work		Employees
Manual Handling		Employees
Neglect		Employees
Health and Safety in the Workplace		Employees
Risk Assessment in the Workplace		Employees
Understanding Behaviour of Children and Young People		Employees
Domestic Abuse and Intimate Partner Violence		Employees
Customer Service - Angry Customers (Engage in Learning)		Employees
Working with Display Screen Equipment		Elected Members & Employees
People Skills		Elected Members & Employees
Environmental Awareness		Elected Members & Employees
Managing Teams		Elected Members & Employees
Stress in the Workplace		Elected Members & Employees
Customer Service		Employees
Fighting Fraud in Local Government		Employees
Safeguarding Adults - Level 2		Employees
Care Act - Information and Advice		Elected Members & Employees
Autism Awareness		Elected Members & Employees
Care Certificate Assessor Training		Employees
Care Certificate - Digital Learning Suite		Employees
Food Allergy Awareness		Employees
Child Sexual Exploitation - Level 2		Employees
Bullying and Cyberbullying		Employees
Online Safety for Parents and Carers		Employees
Sexual Abuse and Recognising Grooming		Employees
Female Genital Mutilation		Employees
First Aid		Elected Members & Employees

Legionella and Legionnaires' Disease Awareness		Employees
Counter Terrorism		Employees
DriveAware		Employees
Human Trafficking and Modern Day Slavery		Employees
Moving and Positioning of Individuals		Employees
Asbestos Awareness (MEL)		Employees
Self-Esteem and Assertiveness - Boost your Confidence in the Workplace		Employees
Age		Employees
Setting Objectives		Employees
Making Objectives Happen		Employees
Thriving in Change		Employees
Working in Teams		Elected Members & Employees
Collaborative Working		Elected Members & Employees
Delegation Skills		Elected Members & Employees
Effective Time Management		Employees
Disability Awareness		Elected Members & Employees
Head in the sand? - Tackling difficult conversations		Elected Members & Employees
Driver Safety		Employees
Financial Management and Budgeting		Employees
LGBT Awareness		Elected Members & Employees
Ambiguity		Employees
Managing Change		Elected Members & Employees
Equality and Diversity		Elected Members & Employees
Introduction to Project Management		Employees
Safeguarding Adults - Level 1		Employees
Safeguarding Adults - Level 2		Employees
An Introduction to Managing Health and Safety		Employees
Unconscious Bias		Employees
Loneliness and Isolation		Elected Members & Employees
Gangs and Youth Violence		Employees
Cultural Awareness in Safeguarding		Elected Members & Employees

Basic Life Support (BLS)		Employees
Gypsy and Traveller Cultural Awareness (FFT Bespoke)		Elected Members & Employees
New and Expectant Mothers		Employees
Self-Harm		Employees
Missing Children		Employees
Keeping Good Records		Elected Members & Employees
Working at Height		Employees
Future ways of working		Elected Members & Employees
Managing Virtual Teams		Elected Members & Employees
Hate Crime		Employees
Bury Council UK GDPR Suite		Elected Members & Employees

Accessing LGA Councillor Development Tools

The Local Government Association offers a wide range of development resources to Councillors.

How to access Councillor Workbooks

- You will need a computer with internet access
- Go to the following website www.lga.gov.uk
- Click 'Our Support' then 'Leadership, Workforce and Communication'
- If you then scroll down you see 'Councillor Development'
 - The page details a list of resources available Click Distance Learning Resources A list of Councillor Workbooks are available: How to access Councillor LGA e-learning Follow the instructions as above Click Distance Learning Resources

Councillor E-Learning can be found here:

[Councillor e-learning | Local Government Association](#)

The following modules are available:

- Audit committees (an introduction)
- Biodiversity for councils
- Commissioning council services
- Community engagement and leadership
- Corporate parenting
- Councillor Code of Conduct
- Councillor induction
- Economic development
- Equality, diversity and inclusion
- Facilitation and conflict resolution
- Handling intimidation
- Holding council meetings online
- Influencing skills
- Licensing for councillors
- Local government finance
- Planning
- Police and crime panels
- Scrutiny for councillors
- Stress management and personal resilience
- Supporting mentally healthier communities
- Supporting your constituents with complex issues
- The effective ward councillor
- UK General Data Protection Regulation (GDPR).

Accessing Northwest Employer Councillor Development Tools

Community Leadership

Northwest Employers offer a range of support covering the full lifecycle of a councillor, including services around political leadership, personal development as well as scrutiny and governance. Underpinned by the 21st century councillor research and complemented by their Councillor Charter.

Councillor Induction Programme

Their regional councillor induction programme provides newly elected Councillors with a real-life introduction to the role.

This interactive programme is conversational and provides answers to questions that other Councillors may wish they had known at the start of their political careers.

North West Charter for Councillor Development

At the heart of any council dedicated to meeting the needs of its community there will also be a commitment to the development of its Councillors. This core principle underpins the North West Member Development Charter.

Using an established framework, councils undertake a self-assessment to review their good practice supporting and developing councillors to fulfil the vital role they play working with and supporting local communities; before a formal assessment process which is carried out by one of our team and a member of our Executive Board.

To access this information please contact our Mayoral and Member Support Officer (contact details can be found at the end of this booklet)

Contact us!

Mayoral and Member Support Officer – Andrea Tomlinson	A.J.Tomlinson@bury.gov.uk
Democratic Services Julie Gallagher Philippa Braithwaite Michael Cunliffe Chloe Ashworth Andrea Tomlinson Kelly Barnett Julie Tunstall	Democratic.Services@Bury.gov.uk Julie.Gallagher@bury.gov.uk P.Braithwaite@bury.gov.uk M.Cunliffe@bury.gov.uk C.Ashworth@bury.gov.uk A.J.Tomlinson@bury.gov.uk Kelly.Barnett@bury.gov.uk J.Tunstall@bury.gov.uk
ICT Service Desk	0161 253 5050
Bury Council E-Learning	psd@bury.gov.uk 0161 253 6808
LGA	Email: info@local.gov.uk Telephone: 020 7664 3000
North West Employers	support@nwemployers.org.uk 0161 834 9362

Personal Training Record

Councillor attendance at Council offered events will be recorded.

However, so we can continually monitor the uptake of training and monitor this through the Member Development Group we ask that you also keep a record and update us when courses have been undertaken.

Name _____ Year _____

Role(s) _____

Date Completed	Workshop/Event/Conference/E-learning/Workbook

