

EXTRACT FROM CONTRACT PROCUREMENT RULES

1. Appointment of Consultants

2. Consultants

- a. It is important that best value is obtained when employing consultants. Therefore, for all instances where the Contract Value of a consultancy appointment is over £5,000, the commissioning officer must provide a report to the Head of Service responsible containing as a minimum the details listed in Project Details (below).
- b. All consultants must provide evidence of adequate professional indemnity insurance as determined by the Risk Manager prior to their appointment. The requirement for insurance and the levels required should be advised in the specification of works. This insurance must be maintained for a minimum of 6 years after the contract ends.
- c. It should be a condition of contract with any consultant, agent or professional advisor who is to be responsible to the Council for the award or supervision of a contract on its behalf, that in relation to that contract they shall:
 1. comply with these Procurement Rules as though they were an employee of the Council; and
 2. produce on request all the records maintained by them in relation to the contract and award of contract; and
 3. on completion of the contract, transmit all records that they have produced or received that relate to the contract to the appropriate Strategic Director.
- d. Any letter of appointment or contract must set out the consultants legal obligations to the Council.
- e. The Strategic Director shall be responsible for ensuring that the consultant's work is properly monitored on an ongoing basis. This includes:
 1. appointing a named project officer or group; and
 2. specifying key tasks and dates for consultants; and
 3. monitoring costs against budgets; and
 4. arranging regular progress meetings with consultants.
- f. The project officer shall maintain the following documentation:
 1. project brief/objectives; and
 2. minuted authority, were required; and
 3. the agreement with the consultant and any subsequent variations; and
 4. records that can demonstrate contractors compliance with contract standards prior to payments being made; and

5. record of payments made to the consultant and for the project; and
 6. a project evaluation form.
- g. The project officer shall report immediately to the Strategic Director any material technical or financial deviation by the consultant from the specified agreement.
- h. At the end of a project a post-project appraisal exercise should be carried out that includes an assessment of the consultant's performance.

3. Project Details

- a. Before consultants are invited to bid/tender, the Strategic Director shall:
1. identify the project objectives; and
 2. document the reasons for the employment of consultants including the benefits of employing consultants against in-house staff or agency staff; and
 3. document the residual in-house costs to support the consultant and ensure that sufficient budget is available to meet all identified costs; and
 4. prepare a project brief, including:
 - a. background; and
 - b. objectives; and
 - c. timetable; and
 - d. costs; and
 - e. monitoring arrangements; and
 - f. documentation standards; and
 - g. contact names and numbers for enquiries.