Develop Documents

This section of the Procurement Journey provides you with guidance on the following:

- exclusion, selection and award criteria
- SPD
- specification
- Invitation to Tender (ITT) - including terms and conditions.

Checklist

Checklist

Information to Include in your Tender

Go to Checklist Links to content

This provides a list of documents that can be included in your tender.

For complex and higher value regulated procurements, you may find some of the guidance and tools in **Route 3** to be of benefit, but you only need to follow Route 3 where the procurement exercise is above the **GPA threshold** value.

If You Use PCS-Tender

Open or close

It is best practice to have all documentation created on **PCS-Tender** before preparing the Contract Notice and advertising the requirement.

If You Use Public Contracts Scotland (PCS)

Open or close

If you decide to use the online SPD Module on **Public Contracts Scotland (PCS)** (the Module), the selection and exclusion criteria will need to be detailed in the SPD i.e. not in the Contract Notice.

The default exclusion criteria required for a process valued equal to or above the **threshold** is provided automatically in the Module. You should deselect any that are not legally required or relevant and proportionate to your procurement exercise.

You are required to choose the selection criteria relevant to your procurement exercise from the provided list in the Module. You should not disclose information provided by tenderers which has been designated as confidential. This could include, but is not limited to, technical or trade secrets and the confidential aspects of tenders.

You may wish to consider adding a requirement to ensure your Organisation's confidential information is protected throughout the procurement process.

Consideration must also be given to **Planning**, **Sustainable Procurement** and **Risk Management** throughout this stage of the Journey.

Data Protection

Open or close

Organisations should ensure that:

- all relevant procurement documents make reference to the **Data Protection Legislation;**
- their terms and conditions are up-to-date, and accurately reflect current Data Protection Legislation and the Organisations own policies.

You should seek legal advice to ensure the above fits the nature of the requirement and the other documentation used.

More detailed information on data protection can be found in **Additional Resources**.

Remember

You should use lessons learned from previous contracts/procurement exercises to inform your new strategy. As you progress through the Journey you should constantly re-inform your strategy with any new information.
