

How to conduct a direct award procurement

A. The Request for tender:

1. Get a "diarienummer/ dnr" from the diary.
2. Download the templates "DA-template Procurement documents" and "DA-template Contract terms". Add the name and dnr (xx) to the templates and remove the words "DA-template" so that they are named "Procurement documents XX" and "Contract terms XX".

Enter the relevant information and remove nonrelevant information in the templates. The documents must show the needs for your delivery, and nothing else. The **yellow** texts must be adapted, but more alterations may be needed. See also instructions in the templates.

3. Download "Stockholm University's General Terms and Conditions 2021".

Download the "Personal data protection agreement" if applicable.

4. Check all dates.

The procurement documents are ready!

5. Write a general text for your request for tender. Choose at least three suitable suppliers for the request for tender.
6. Send the Request for tender to the suppliers by individual e-mails, as the suppliers must not know which, or how many, other suppliers that are invited. Send the e-mails as simultaneously as possible. State clearly which date that is the last day for tender.

The request for tender must include all relevant parts as added appendices: "Procurement documents XX", "Contract terms XX", "Stockholm University's General Terms and Conditions 2021" and if applicable "Personal data protection agreement".

B. Process, evaluation and choice of supplier/ awarding of contract:

All information regarding the offers and the evaluation are confidential until the award decision has been made. Do not share any such information during this time.

7. Check your e-mail regularly for questions, and answer them promptly. The answers are valid before the original text. If your answers change the procurement documents in any essential way, you may consider to move the last day for tender accordingly.

The answers must be sent to all suppliers by individual e-mail, as simultaneously as possible. Be careful to remove any information regarding who put the question forward and/ or other information that may show which the suppliers are.

8. The tenders must not be opened until the day after the last day for tender. Make a list of the tenders and the tenderers.

9. Evaluation and awarding of contract must be made as stated in the procurement documents. Document the process and the result, including the reasons why the winning supplier should be awarded the contract in "Template Procurement report". Send a copy to Inköps- och Upphandlingssektionen.



10. Enter the information in "Template Award decision" and rename it "Award Decision XX".

The award decision must be made by an authorized person, in accordance with Besluts- och delegationsordningen. Present the document to the authorized signatory.

Besluts- och delegationsordningen:

<https://www.su.se/medarbetare/organisation-styrning/styrdokument-regelboken/organisation-och-beslutsstruktur/arbetsordning-respektive-besluts-och-delegationsordning-f%C3%B6r-stockholms-universitet-1.26273>

11. The tenderers must be informed of the award decision promptly. The message must include a copy of the decision and adequate information of why the winning supplier has been awarded the contract.

The contract may be entered into as soon as the direct decision has been made public. There is no need for a standstill period. It is however a good idea to contact any tenderers that may have need of an explanation of the result.

The procurement is now concluded!

The procurement confidentiality is lifted. Information in the tenders may however be protected/ made confidential on the request of the tenderer. Do not provide tenders to others without a prior confidentiality check.

C. The Contract:

12. Make the applicable adjustments of "Contract terms XX" regarding the supplier, prices and any other information from the tender. Rename it "Contract xx".

If the request for tender included the "Personal data protection agreement" it too must be adjusted accordingly.

13. Send the Contract with appendices "Contract xx", "Stockholm University's General Terms and Conditions 2021" and if applicable "Personal data protection agreement" to the winning supplier as pdf-files by e-mail. Ask that they print two copies of each one original for each party, arrange for signatures on both by an authorized signatory, and send the signed originals back to you by mail..

14. Check the documents when they arrive, there must be no changes. Ask the authorized signatory for Stockholm University (see the Besluts- och delegationsordningen) to enter into the contract by signing both copies.

The contract is valid when both parties has signed!

15. Send one copy of the signed contract with appendices to the supplier by mail. The suppliers often appreciate if you send a scanned copy by e-mail before you post the contract to them.

D. Diary and Archive

16. Register the documents in the diary as stated in Dokumenthanteringsplanen, and send any originals to the archive.

E. Follow-up

17. It is important that we check that the delivery is in accordance with the contract.

18. Make notes of anything that may be valuable in the next procurements!