

SITE SURVEY REPORT

Procurement Approval Checklist

Prepared for	Fernhill Distribution Ltd
Date	6 Oct 2026
Site	Ashby Road depot, Loughborough
Prepared by	T. Varga

FORM

Procurement Approval Checklist

1. Purchase request

Project	Ashby Road depot, Loughborough: bay 3 dock leveller repair purchase (completed example)
Site or delivery address	Ashby Road depot, Unit 2, Loughborough LE11
Organisation	Fernhill Distribution Ltd
Location (GPS)	52.7704, -1.2342
Request date	6 Oct 2026
Requested by	T. Varga (site engineer)
Requisition or request number	REQ-EXAMPLE-2291
Department or cost centre	Warehouse operations, Loughborough
What is being bought	Services
Reason	Replacement of failed or worn equipment
What is needed and why	Replace the leaking main lift cylinder and hoses on the bay 3 dock leveller. The bay is out of use, so all trailers go through bays 1 and 2 and evening loading is running late.
Needed by	20 Oct 2026
Equipment being replaced (make, model, asset number)	Bay 3 dock leveller, hydraulic, asset DL-EXAMPLE-03

Photos: the fault, the worn item or the place it is needed



An internal approval record for one purchase: the need, the quotes, the checks and who approved it. It records that your own purchasing policy was followed. It is not a public-sector tender record and does not replace a contract.

2. Budget and value

Budget or nominal code	MAINT-EXAMPLE-4410
Budget holder	H. Doyle (site general manager)
Budget available for this purchase (£, excluding VAT)	6000
Estimated value (£, excluding VAT)	5000
Type of spend	One-off purchase
Is the organisation a contracting authority under the Procurement Act 2023?	No
Quotes your purchasing policy needs at this value	3

3. Quotes

Quotes received 1: Midshire Door and Dock Services Ltd

Supplier	Midshire Door and Dock Services Ltd
Quote reference	Q-EXAMPLE-7781
Price (£, excluding VAT)	4850
Lead time (working days)	5
Meets the specification?	Yes

Supplier status	Approved supplier
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Accepts our terms, or terms agreed?	Yes
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Result	Compliant
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Quotes received 2: Rapid Loading Bay Repairs

Supplier	Rapid Loading Bay Repairs
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Quote reference	RLB-EXAMPLE-15
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Price (£, excluding VAT)	4200
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Lead time (working days)	8
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Meets the specification?	Yes
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Supplier status	New supplier: not evaluated
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Accepts our terms, or terms agreed?	No
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Result	Not compliant
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Why it is not compliant	New supplier with no evaluation, and the quote is on their own terms with no insurance details. Could not be evaluated before the bay is needed back.
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Quotes received 3: Trentvale Industrial Doors Ltd

Supplier	Trentvale Industrial Doors Ltd
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Quote reference	TID-EXAMPLE-0932
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Price (£, excluding VAT)	5300
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Lead time (working days)	3
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Meets the specification?	Yes
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Supplier status	Approved supplier
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Accepts our terms, or terms agreed?	Yes
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Result	Compliant
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Quotes received	3
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Compliant quotes	2
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Lowest compliant quote (£)	4850
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Saving against the budget (£)	1150
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Fewer compliant quotes than your policy needs. Get more quotes, or record why not (for example a single source) and who agreed it.

Why fewer quotes, and who agreed it	Three quotes received, two compliant. Agreed by H. Doyle on 6 Oct to proceed with two compliant quotes so the bay is back in use this month.
Chosen supplier	Midshire Door and Dock Services Ltd
Chosen price (£, excluding VAT)	4850

4. Declarations of interest

Declarations 1: T. Varga

Name	T. Varga
Role in this purchase	Requester
Declaration	No interest to declare
Signature	

T. Varga

Declarations 2: P. Lindqvist

Name	P. Lindqvist
Role in this purchase	Evaluator (maintenance planner)
Declaration	Interest declared
The interest	Brother-in-law is a service engineer at Trentvale Industrial Doors Ltd.
How it is managed	Stood back from comparing the quotes. T. Varga and H. Doyle compared them.
Signature	

P. Lindqvist

Declarations 3: H. Doyle

Name	H. Doyle
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Role in this purchase	Budget holder and approver
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Declaration	No interest to declare
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Signature	
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H. Doyle

Interests declared	1
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UK Bribery Act 2010, section 7: a commercial organisation commits an offence if a person associated with it bribes someone to win or keep business for it. Having adequate procedures to prevent bribery is a defence. Gifts or hospitality from bidders belong in the checks on the next page.

5. Approval checks

Need confirmed by the budget holder	Acceptable
Specification or scope of work written and agreed	Acceptable
Budget available on the code given	Acceptable
Quotes obtained as the purchasing policy requires	Acceptable
Chosen supplier approved, or evaluated before the order	Acceptable
Supplier checks done: company details, insurance and any certificates the work needs	Acceptable
Everyone involved has declared any interest in the bidders	Acceptable
No gifts or hospitality from bidders, or any received declared and recorded	Acceptable
Price, delivery, payment terms and warranty agreed in writing	Action needed
What needs doing, or why not checked	Quote gives price and lead time but no warranty on the new cylinder and hoses. Get the warranty in writing before the order.
Order placed on our purchase order or contract terms	Acceptable
Data handling terms agreed if the supplier will hold personal data	Not applicable
Delivery, installation and acceptance arrangements agreed	Acceptable

Order not split to stay under an approval limit	Acceptable
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Checks acceptable	11
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Checks needing action	1
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Not checked	0
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Checks complete %	92
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Checks complete % = acceptable / (acceptable + needing action) x 100, ignoring not checked and not applicable. Our own measure, not a standard. Approve only at 100%, or with conditions that close the open checks.

6. Approval and sign-off

Checks needing action	1
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Result	Checks to close before the order is placed
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Actions 1: Get Midshire's warranty terms for the new cylinder and hoses in writing and attach them to the order.

Action	Get Midshire's warranty terms for the new cylinder and hoses in writing and attach them to the order.
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Priority	Before the order is placed
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Who will do it	T. Varga
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Due by	7 Oct 2026
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Status	Done, checked
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Actions 2: Send Rapid Loading Bay Repairs the supplier evaluation questionnaire so they can quote next time.

Action	Send Rapid Loading Bay Repairs the supplier evaluation questionnaire so they can quote next time.
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Priority	At contract review
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Who will do it	P. Lindqvist
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Due by	30 Nov 2026
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Status	Open
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Actions still open	1
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Decision	Approved with conditions
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Contract or price review date	6 Oct 2027
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Approver's role	Site general manager
Approver's delegated limit (£, excluding VAT)	10000
Value being approved (£)	4850
Value against the limit	Within the approval limit
Purchase order number raised	PO-EXAMPLE-55120
Conditions of approval	Order only once Midshire confirms the warranty on the cylinder and hoses in writing.
Approval note	Approved at £4,850 with Midshire, the lowest compliant quote, £1,150 under budget. Two compliant quotes against a policy of three, agreed by the budget holder. One interest declared and managed. Order released once the warranty was confirmed.
Approver name	H. Doyle
Approver signature	

H. Doyle

Finance or second approver name	R. Ince (finance business partner)
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Finance or second approver signature	
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R. Ince