**Step 6**

**Decide (latest according to agreed deadline) whether your building association wants to proceed to the planning phase of group procurement and which of the proposed measure(s) you are involved in.**

**Useful tips for step 6:**

**Planning phase: tendering and content**

**-organize a common forum workshop including following topics:**

**-building up a group procurement organization**

**-launching the planning phase for group procurements**

**-launching the tendering process to get a consultant for the planning phase (according to same principles as energy audits)**

**-> send tender requests for potential planning phase consultant.**

**-try to receive at least 3 offers. Consider, if it’s beneficial to use the same organization who performed the energy audits. Note, the implementing of planning phase requires time**

**Specify exactly in the tender request what shall be the result of planning phase provided by chosen consultant:**

**-comparison of proposed investments / measures**

**-preliminary costs and price estimates**

**-necessary ancillary work**

**-permits by authorities and other documents, which are required before starting the implementation phase**

**-proposal of financing sources / methods**

**-gathered sufficient amount (min 3) of tenders provided by service providers for the implementation phase and assistance in the selection process. Note, some periods of year may be challenging for suppliers to provide offers, if they are at the same time implementing installations. Enough time to gather tenders is needed. At least following information shall be included in tenders:**

**- presentation of technologies & equipment to be utilized in the implementation phase (based on details presented in tenders above)**

**-clear specification, how the pricing differs for individual procurement / group procurement. The offer must clearly indicate the economic benefit of group procurement -> how group procurement affects to unit prices**

**-comparison of the content. The cheapest one is not necessarily the best one, if the content does not sufficiently meet the requirements**

**-ask for references from previous similar projects**

**- define the deadline when the plan must be ready**

**- agree convenient number of common workshops to present the progress of planning phase**

**-participate in the workshops during the planning phase and be active in the meetings: make questions, give comments, ask for more details etc…**

**-gather and submit any additional documents/materials requested regarding your housing association to ensure the smooth progress of planning phase**

**-participate on site visits to your building and be ready to clarify some relevant issues and provide any additional documents**

**-> When all this is fulfilled -> the planning phase is completed.**