



# Procurement Policy



Information for Stakeholder Consultation and Approval Body {this would be deleted once it has been for approval]

<b>Review Type</b>	<input type="checkbox"/>	<b>New</b>	<input checked="" type="checkbox"/>	<b>Minor Review/ No Change</b>	<input type="checkbox"/>	<b>Major Review</b>
<b>Reason for review</b>	<input type="checkbox"/>	<b>Review Date</b>	<input type="checkbox"/>	<b>Legislative / Regulator Change</b>	<input checked="" type="checkbox"/>	<b>Other</b>
<b>Other notes:</b>	<b>As well as small changes to improve clarity, the main additions include at Section 15 General policy statements to include statements on</b>  <b>Modern slavery</b> <b>Sustainable and inclusive growth</b> <b>Climate change</b>					



<b>Title of Policy</b>	Procurement Policy		
<b>Approved by</b>	SMT		
<b>Approval Date</b>	Click here to enter a date.		
<b>Owner</b>	Director of Finance and Resources		
<b>Author</b>	Jason Brown		
<b>Version</b>	2.0		
<b>Period of Review</b>	60 months		
<b>Date of Review</b>	Click here to enter a date.		
<b>Lead Directorate</b>	Business Growth and Development		
<b>Stakeholders</b>	<input type="checkbox"/> Partnership Forum <input type="checkbox"/> Staff Forum <input checked="" type="checkbox"/> Finance <input type="checkbox"/> Operations	<input type="checkbox"/> Human Resources <input checked="" type="checkbox"/> Property <input type="checkbox"/> BR24 <input type="checkbox"/> Business Development	<input type="checkbox"/> ICT <input type="checkbox"/> Other
<b>Scottish Social Housing Charter Outcomes and Standards this policy helps to achieve</b>	<input type="checkbox"/> Outcome 1 <input type="checkbox"/> Outcome 2 <input type="checkbox"/> Outcome 3 <input checked="" type="checkbox"/> Outcome 4 <input checked="" type="checkbox"/> Outcome 5	<input checked="" type="checkbox"/> Outcome 6 <input type="checkbox"/> Outcome 7 <input type="checkbox"/> Outcome 8 <input type="checkbox"/> Outcome 9 <input type="checkbox"/> Outcome 10	<input type="checkbox"/> Outcome 11 <input checked="" type="checkbox"/> Outcome 13 <input checked="" type="checkbox"/> Outcome 14 <input type="checkbox"/> Outcome 15
<b>Care Standards this policy helps to achieve</b>	<input type="checkbox"/> <a href="#">Standard 1</a> <input type="checkbox"/> <a href="#">Standard 4</a>	<input type="checkbox"/> <a href="#">Standard 2</a> <input type="checkbox"/> <a href="#">Standard 5</a>	<input type="checkbox"/> <a href="#">Standard 3</a>



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## 1 Introduction

- 1.1. Our vision is a Scotland where people of all ages are respected can make their own choices and lead independent and fulfilling lives.
- 1.2. Our mission is to improve the quality of life of older people by offering a diverse range of housing, care, and other services.
- 1.3. We spend in excess of £17 million each year with external suppliers and contractors on goods, services and works. We need to ensure we achieve value for money when achieving our strategic and business objectives, but through effective procurement we can have a positive socio-economic and environmental impact.
- 1.4. The Procurement Policy sets out the fundamental rules applicable to procurement activity within Bield. It seeks to provide straightforward and comprehensive guidance about the procurement process for staff to follow.
- 1.5. The Policy should be read in conjunction with [Bield's Procurement Strategy](#), Financial Regulations and Authorisation Levels & Approval Procedures; as well as any department specific policy and procedures.
- 1.6. This policy embodies our values, which are:

Honesty	Equality and Diversity	Ambition	
Dignity	Integrity	Caring	Kindness

## 2. Policy outcomes and scope

- 2.1. The purpose of this policy is to:
  - Provide clarity on our approach to procurement for our customers, colleagues, and Board members
- 2.2. The Procurement Policy applies to all third party expenditure in relation to goods, services and works. This includes purchases for routine supplies and services through to more complex projects for buildings and refurbishments.
- 2.3. For the purposes of this Policy 'procurement' does not include contracts for the acquisition of land or buildings or for any interest in land – these are covered in Bield's [Acquisition Policy](#).
- 2.4. It also does not include contracts which Bield bids for as a supplier/service provider.

## 3. Equality, diversity, and inclusion

- 3.1. When carrying out this policy we will adhere to our Equality and Diversity Policy which aims to promote diversity, fairness, social justice, and equality of opportunity. An Equality Impact Assessment was carried out in relation to this policy and this is included at [Appendix 1](#).
- 3.2. All procurement activity will be fair, transparent and proportionate and will not allow for discrimination of any type.



3.3. In addition to the points made above, to help promote equality and inclusion, the following steps will be taken for this policy:

- Large print and easy to read version
- Translation and interpretation message on the back of the policy.

## **4. Guiding principles**

4.1. All procurement activity will adhere to the following principles:

- Accountability;
- Integrity;
- Efficiency;
- Openness;
- Fairness;
- Transparency.
- Sustainability
- Equal treatment and non-discrimination; and
- Proportionality.

## **5. Role of procurement function**

5.1. The procurement function sits within the Finance and Resources Directorate.

5.2. The function is responsible for delivery of the Procurement Strategy and associated activity.

5.3. This includes coordination of activity in order to:

- deliver the actions set out in the procurement strategy action plan and the annual contract delivery plan
- provide advice and guidance to Bield colleagues.

5.4. Procurement is a support function and therefore ownership, commitment and resource is ultimately required from spending departments in order to deliver the organisation's procurement objectives.

5.5. This is coordinated via the Senior Management Team, Leadership Team and associated operational management teams.

## **6. Unplanned expenditure**

6.1. A business case or Single Source Justification is required where expenditure in excess of £50,000 is

- unplanned,
- one-off in nature or
- relates to a capital project (whether for development or otherwise)

6.2. In the case of development projects, for example new build projects, a more detailed 'Project Brief' will also be prepared to sit alongside the Single Source Justification.

6.3. In all cases, a Business Case or Single Source Justification will require relevant approval from Senior Management Team before it can progress to the procurement stage.



## 7. Procurement route

- 7.1. The flow chart shown at Figure 1 sets out the various steps to be followed in order to determine the most appropriate procurement route.
- 7.2. Details of the Procurement Routes are shown in Appendix 1-6

## 8. Non-competitive action

- 8.1. At times there may be genuine and justified reason(s) for by-passing the procurement process outlined in Section 7.
- 8.2. In these circumstances, Director approval can be sought to carry out a 'non-competitive action'.
- 8.3. This should subsequently be reported to the Procurement Manager who will record such instances and report to Senior Management Team on a 6-monthly basis.
- 8.4. Please note that non-competitive action is an exceptional procedure and should be strictly limited to certain situations.
- 8.5.** It may also be necessary to publish a contract award notice (without competition) and to include information within Bield's Contract Register, depending on the contract value. In This instance a Single source justification form should be completed, which can be requested from the Procurement Manager. This should only be used where there is an urgent requirement or a single specialist supplier. For further information contact the Procurement Manager.

## 9. Authorisation and approval

- 9.1. Any Bield employee can obtain quotations, however the Authorisation Levels & Approval procedures must be adhered to before any commitment to spend is made. The procurement manager should be notified before requirements are published. Thresholds and authorisation levels can be located within Appendix 6

## 10. Bield contract register

- 10.1. The Procurement Reform Act requires organisation to publish details of all contract above the Regulated Procurement Threshold (£50,000) in a corporate contract register, which is to be made available online.
- 10.2. Bield's Contract Register can be found by clicking the link below.  
[www.publiccontractsscotland.gov.uk/Contracts/Contracts\\_Search.aspx?AuthID=AA13722](http://www.publiccontractsscotland.gov.uk/Contracts/Contracts_Search.aspx?AuthID=AA13722)
- 10.3. This will automatically be populated for all Quick Quotes and Tenders published on Public Contracts Scotland.
- 10.4. Any contracts awarded out with this (i.e. non-competitive action) will have to be manually added.

## 11. Savings and benefit reporting



- 11.1. Bield's Procurement Strategy sets out a number of performance measures which will be reported to the Senior Management Team 6-monthly and the Board annually.
- 11.2. Staff will be required to provide information to the Procurement Manager in relation to the following:

#### **Priority**

1. Direct Price Based Savings (cash)
2. Price v Market Savings (non-cash)
3. Process savings from use of collaborative arrangements (non-cash)

#### **Secondary**

4. Sustainability benefits, in addition to those achieving price based savings (non-cash)
5. Community benefits (non-cash)

## **12. Document handling and document retention**

- 12.1. Since all procurement will be undertaken electronically, there is no need for opening of quotations/tender responses to be witnessed.
- 12.2. A file should be kept in case of any future audit and should be retained in line with Bield's [Retention Schedules](#)

## **13. Procurement policy statements**

- 13.1. The Procurement Reform Act requires organisations to set out within their Procurement Strategy their general policy in relation to a number of areas as follows.
- 13.2. These should be considered in relation to all procurement activity.

#### **Use of community benefit**

- 13.3. In relation to all regulated procurement activity we will consider at the outset whether there is the potential to include a community benefit clause and if so then we will incorporate this into the procurement process.
- 13.4. Specifically when considering community benefits we will not only look to benefit the local communities where our developments are located; but we will seek opportunities that help to improve the lives of older people.
- 13.5. We will monitor and report on the use of community benefit clauses within our contracts and the outcomes achieved.

#### **Use of community benefit requirements**

- 13.6. In relation to all regulated procurement activity we will consider at the outset whether there is the potential to include a community benefit clause and if so then we will incorporate this into the procurement process.
- 13.7. Specifically when considering community benefits we will not only look to benefit the local communities where our developments are located; but we will seek opportunities that help to improve the lives of older people.





13.8. We will monitor and report on the use of community benefit clauses within our contracts and the outcomes achieved.

#### **Consulting and engaging with those affected by our procurement**

13.9. At Bield, we aim to have customer engagement at the heart of our decision making processes.

13.10. In relation to procurement we will strive to consult, discuss and engage with customers who are directly affected by the work taking place, ahead of any decisions being made.

13.11. This ensures that we understand expectations and can ensure that these are incorporated into the procurement process.

13.12. We will measure procurement outcomes to ensure that those expectations have been met and that they benefit our customers.

#### **Payment of the Living Wage to persons involved in producing, providing or constructing the subject matter of regulated procurements**

13.13. Bield recognises the value of a well-motivated and dedicated workforce both in its own organisation and in those of its suppliers and contractors and that payment of living wage is a significant motivator.

13.14. Payment of living wage itself will not be a condition of any assessment process, however in all contracts we will consider whether it is reasonable and proportionate to allocate additional points to those who pay living wage.

#### **Implementation of Fair Work First into all procurements both regulated and non-regulated**

13.15. Fair Work First will be relevant where the way the workforce are engaged will impact on the way the contract is performed. This will be particularly relevant in service and works contracts, where the workforce make a significant contribution to the way the contract is delivered. In goods contracts Fair Work First may also be relevant.

#### **Promoting compliance by contractors and sub-contractors with the Health and Safety at Work etc. Act 1974**

13.16. Bield is committed to contracting only with suppliers and contractors who comply with all appropriate and relevant legislation, including Health and Safety legislation.

13.17. Where appropriate, and on a contract by contract basis, Bield should assess the legislation applicable and take steps to ensure bidders comply with such legislation. Where proportionate, we may also assess such compliance of subcontractors.

#### **Procurement of fairly and ethically traded goods and services**

13.18. We will always aim to procure fairly and ethically traded goods and services.

13.19. All tender activity fully complies with Modern Slavery Act 2015

13.20. Where appropriate we will make use of appropriate standards and labels in our procurement to take account of fair and ethical trading considerations.

#### **30-day payment target**



- 13.21. We will ensure that all payments to contractors are made within 30 days of receipt of a valid invoice.
- 13.22. We will introduce clauses into our contracts to encourage our contractors pay their sub-contractors within 30 days.
- 13.23. We will monitor and report on our payment performance to our Board of Management, and as part of our annual Procurement Strategy reporting to Scottish Ministers.

### **Using procurement of food**

- 13.24. How we intend to approach regulated procurements involving the provision of food to:
- improve the health, wellbeing and education of communities in the organisation's area; and
  - promote the highest standards of animal welfare
- 13.25. Bield will work with its suppliers in order to put in place affordable and sustainable contracts which meet the nutritional requirements of our customers.
- 13.26. We will seek information from our contractors in relation to animal welfare.

### **Modern slavery and exploitation**

- 13.27. Bield will consider on a case-by-case basis what tools and provisions can be included in its procurement activities to limit these risks. As a minimum The Modern Slavery act 2015 will be taken into consideration

### **Sustainable procurement**

- 13.28. We will strive to reduce our carbon footprint and support the Scottish Government's ambition to be a net-zero society by 2045.

We will do this by:

- Reducing travel and transportation by using local contractors and suppliers wherever possible;
- Requiring the use of sustainable products and materials in tender specifications wherever possible;
- Promoting a culture of reduce, re-use and recycle amongst our contractors.
- Where food is procured, we will consider the environmental impact of production, supply and packaging and encourage the highest standards of animal welfare.

## **14. Publicising and Accessibility**

- 14.1. This policy will be published on the Bield website and available on the Bield intranet 'Grapevine'.
- 14.2. We are happy to translate any of our policies and provide an interpreter if our customers need help.

## **15. Training and Competence**

- 15.1. The level of involvement required from Bield colleagues in terms of procurement will vary, depending on the nature of their role and the level of expenditure within their department.



- 15.2. Field colleagues will be supported and appropriately trained in order that they are able to fulfil their own responsibilities.
- 15.3. A 'Procurement Learning and Development Strategy' is currently being developed in order to ensure that any gaps in procurement capability are identified and addressed, and that support and training are allocated appropriately.

## **16. Scheme of Delegation**

- 16.1. The Board is ultimately accountable for all procurement carried out within the organisation and will provide effective leadership to ensure that the Procurement Strategy objectives are delivered. Further details can be found within the [Scheme of Delegation](#).
- 16.2. Responsibility for operational delivery of procurement activity is delegated via the Senior Management Team, which subsequently delegates in line with the organisation's Authorisation Levels and Procedures.
- 16.3. The **Procurement Manager** is responsible for providing leadership in terms of the delivery of the Procurement Strategy and annual Procurement Action Plan and Contract Delivery Plan as well as reporting on performance.
- 16.4. The Procurement Reform Act introduced a level of accountability to Scottish Ministers, where performance against the procurement strategy objectives is to be provided on an annual basis.
- 16.5. All Field colleagues are responsible for ensuring that value for money is delivered and that all goods, services and works are procured in line with the guiding principles highlighted above.
- 16.6. Field colleagues are responsible for ensuring that the Procurement Policy is adhered to and that the relevant procedures are followed as required.
- 16.7. The level of involvement required from staff in terms of procurement will vary, depending on the nature of their role and the level of expenditure within their department.
- 16.8. Colleagues will be supported and appropriately trained in order that they are able to fulfil their own responsibilities.
- 16.9. A 'Procurement Learning and Development Strategy' is currently being developed in order to ensure that any gaps in procurement capability are identified and addressed, and that support and training are allocated appropriately.

## **17. Monitoring, Reporting, and Review**

- 17.1. The Procurement Policy and Procedures will be reviewed as required, in response to any specific legislative or national policy changes.
- 17.2. In addition the Procurement Policy and Procedures will be fully reviewed in a five-year cycle.

## **18. Complying with the Law and Good Practice**

- 18.1. The legal framework associated with procurement activity includes:
  - Procurement Reform (Scotland) Act 2014



The Act **imposes duties for Scottish public bodies**, including sustainability requirements and a lower regulated threshold of £50,000.

- Public Contracts (Scotland) Regulations 2015
- Procurement (Scotland) Regulations 2016
- Guidance under the Procurement Reform (Scotland) Act 2014 (issued 21 June 2021)

18.2. The above legislation and associated documentation sets out in Scottish Law the requirements originally arising from European Procurement Directives as well as Scotland-specific requirements as set out by the Scottish Government.

18.3. The Procurement Reform Act introduces a new 'Sustainable Procurement Duty' which sits at the heart of the new legislation and requires organisations to consider in relation to all regulated procurement how it can:

- improve the economic, social and environmental wellbeing of the authority's area (this is the area in which the organisation operates);
- facilitate the involvement of small and medium enterprises, third sector bodies and supported businesses in the process; and
- promote innovation.

18.4. As a Registered Social Landlord (RSL), we are regulated by the Scottish Housing Regulator (SHR). The SHR's statutory objective is to safeguard and promote the interests of current and future tenants, homeless people, and other people who use services provided by social landlords. In developing our policy, we have taken account of good practice, including that developed by the Scottish Housing Regulator.

18.5. The SHR uses the outcomes and standards in the Charter to assess the performance of social landlords. The key outcomes that have been considered in the development of this policy are [delete as appropriate – should match those outlined at beginning of policy]

- |            |  |
|------------|--|
| Outcome 4  | Customers' homes, as a minimum, meet the Scottish Housing Quality Standard ( SHQS) when they are allocated; are always clean, tidy and in a good state of repair; and also meet the Energy Efficiency Standard for Social Housing ( EESSH) by December 2020. |
| Outcome 5  | Customers' homes are well maintained, with repairs and improvements carried out when required, and customers are given reasonable choices about when work is done.   |
| Outcome 6  | Customers' live in well-maintained neighbourhoods where they feel safe   |
| Outcome 13 | Customers receive services of continually improving value for rent and other charges they pay.   |
| Outcome 14 | We strike a balance between the level of service provided, the cost of services and how far current and prospective customers can afford them.   |

## 19. GDPR

19.1. In all procurement activity, consideration will be given as to whether there is a requirement of the supplier or contractor to process personal data.

19.2. If such a requirement exists, due diligence will be undertaken to ensure that the contractor or supplier can implement the appropriate technical and organisational measures to comply with GDPR.

19.3. Roles and responsibilities will be clearly set out within the contract; and contract management activity will include relevant checks to ensure compliance on an ongoing basis.



## 20. Risk management

20.1. Several risk management activities have been identified to ensure this policy is adhered to and that Bield customers experience the best possible experience

- Bield colleagues, Board members, and volunteers are made aware of this policy on publication and during induction of new colleagues.
- Customers and carers are made aware of this policy during service entry.
- A Procurement Risk register will be kept within the contracts register



## Appendix 1 Equality Impact Assessment

1	<b>Title of Policy to be assessed:</b> Procurement policy
2	<b>Date:</b> 09/12/2021
3	<b>Lead Officer/Manager:</b> Procurement Manager
4	<b>EQIA Team (who will be involved):</b> Procurement Manager, Head of Policy & Customer Services
5	<b>Director/Manager:</b> VP of Finance and Resources
6	<b>Is the function or policy existing, new, or review:</b> Existing
7	<p><b>Set out the aims/objectives/purposes/outcomes of the function or policy, and give a summary of the service provided:</b></p> <p>The purpose of this policy is to set out the fundamental rules applicable to procurement activity within Bield. It seeks to provide straightforward and comprehensive guidance about the procurement process for staff to follow</p> <p><b>The policy applies to all Bield colleagues</b></p>
7a	<b>Who should benefit from the policy (target population):</b> Bield staff directly, through clear and straightforward procurement guidance. Bield service users indirectly, by improved Value for Money
7b	<b>Linked policies, functions: Are there any other functions, policies or services, which might be linked with this one for this exercise? Please list.</b>
8	<p><b>State whether the policy will have a positive or negative impact across the following factors and provide initial comments/observations.</b></p> <p><b>Age:</b> Older people, people in the middle years, young people, and children.</p> <p><b>Disability:</b> includes physical disability, learning disability, sensory impairment, long-term medical conditions, mental health problems.</p> <p><b>Maternity and civil partnership</b>  <b>The policy will have no impact on people expecting or recently giving birth or within a civil partnership</b></p> <p><b>Race:</b> Minority ethnic people (includes Gypsy/Travellers, non-English speakers).</p> <p><b>Religion or belief:</b> includes people with no religion or belief.</p> <p><b>Sex:</b> Women, men, and transgender people (include issues relating to pregnancy and maternity).</p> <p><b>Gender reassignment:</b> The process of changing or transitioning from one gender to another.</p> <p><b>Sexual orientation:</b> Lesbian, gay, bisexual, and heterosexual people.</p> <p><b>People in remote, rural, and/or island locations</b></p> <p><b>People in different work patterns:</b> e.g. part-/full-time, short-term, job share, seasonal</p> <p><b>People who have low literacy</b></p> <p><b>People in different socio-economic groups</b> (includes those living in poverty/people on a low income)</p>



	Population groups	Positive Impact	Negative Impact	Comments
	Age			No direct impact
	Disability			No direct impact
	Maternity and civil partnership			No direct impact
	Race			No direct impact
	Religion or belief			No direct impact
	Sex and Gender reassignment			No direct impact
	Sexual orientation			No direct impact
	People in remote, rural, and/or island locations			No direct impact
	People in different work patterns			No direct impact
	People who have low literacy			No direct impact
	People in different socio-economic groups	Builds in protection against modern slavery		
9	<b>What evidence do you have for the statements you have made above? Focus on:</b> <ul style="list-style-type: none"> <li>Needs and experiences;</li> <li>Uptake of services; N/A</li> <li>Levels of participation. N/A</li> </ul>			
10	<b>From the evidence set out what actions, if any, will you take where the negative impact has been identified:</b>			
	Population groups	Proposed action	How will it address the negative impact?	
	Age	N/A	N/A	
	Disability:	N/A	N/A	
	Maternity and civil partnership	N/A	N/A	
	Race	N/A	N/A	
	Religion or belief	N/A	N/A	
	Sex and Gender reassignment	N/A	N/A	
	Sexual orientation	N/A	N/A	
	People in remote, rural, and/or island locations	N/A	N/A	
	People in different work patterns	N/A	N/A	
	People who have low literacy	N/A	N/A	
	People in different socio-economic groups	N/A	N/A	



**Briefly explain how the policy contributes to our equality and diversity values by answering the following questions:**

- How will it provide equality of access to services, information, and employment?
- Does it or could it celebrate diversity?
- Will it or could it promote good relationships within and between communities?
- How will it provide good quality, inclusive services?

it will ensure equal access to people wishing to provide services to Bield by ensuring we follow clear, open process when procuring goods, works and services. It will also help to provide good quality services and guarantee Value for Money for all service users.

**Any additional information, questions, or actions required? Please explain.**

**Sign off:**

**As Director I am satisfied with the results of this EIA**

**The findings will be referred to within Service Plans and target set. The Action Plan will be reviewed annually within Business planning reporting.**

**Signature:**

**Date:**





## Appendix 2 Information on the use of Framework Agreements

Before carrying out any procurement activity, advice on whether there is an existing contract or framework agreement that can meet your needs should be requested from the Procurement manager. This should always be explored in the first instance.

### Bield-specific contracts

The Contract Register with details of all Bield contracts is found [here](#).

### National framework agreements

If there is no Bield contract, next consider if there is a national framework agreement which can be used. A framework agreement is an 'umbrella agreement' that sets out the terms under which individual contracts can be made throughout the period of the agreement.

There are a number of organisations who establish framework agreements on behalf of other organisations. These are procured through a compliant procurement route, including advertising and tendering, which means that this has already been done for the organisations subsequently awarding contracts under the framework agreement.

Bield's Procurement Strategy says:

***'We will always consider using an existing framework agreement before we undertake our own procurement'***

### Finding a Framework Agreement

The following organisations offer framework agreements which Bield is eligible to make use of:

- [Scottish Procurement](#)
- [Scotland Excel](#)
- [Scottish Procurement Alliance](#)
- [Procurement for Housing](#)
- [Crown Commercial Service](#)

There may be other organisations, if you are unsure, Scotland Excel are able to offer a signposting service – please contact [Procurement](#) for more information.

### Using a Framework Agreement

Once you have found a framework agreement which relates to the type of goods, services or works you are looking for, you need to explore to determine whether this meets your needs. [Procurement](#) can provide guidance and support with this.

There are two types of framework agreement:

- a single supplier framework
- a multi-supplier framework

### Single supplier framework agreements – call-offs

Within a single supplier framework, any call-off contracts will be based on the terms laid down in the framework agreement. Buyers may on occasion consult the supplier asking them to supplement the tender as necessary, but this must not result in the inclusion of terms that are substantially amended from those laid down in the original framework agreement.

### Multi-supplier framework agreements – call-offs

Call off contracts can be awarded either:

- Direct Award: by application of the terms set out in the framework agreement itself



- Mini Competition: where not all the terms are set out in the framework agreement, the public body must run a mini competition between the suppliers that are capable of performing the proposed call-off contract. Under a mini-competition, the call-off contract must be placed with the bidder who has submitted the best tender in accordance with the award criteria.

### **Filing and Document Retention**

A file should be kept in case of any future audit and should be retained in line with Bield's [Retention Schedules](#).

This is particularly important if a framework agreement is considered but we then decide to proceed with our own process.



## Appendix 3 Route 1 Quick Quote

If the following criteria apply, Route 1 of the Scottish Government's Procurement Journey is to be followed:

- The expected spend is less than the 'regulated' threshold (i.e. between £10,000-50,000 for goods and services and up to £250,000 for works, over the duration of the contract, including any extension options)
- The purchase is considered to be Low Risk
- The purchase is non-repetitive

### Quick Quote - additional information

#### Use of Quick Quote

The Procurement Journey indicates that use of Quick Quote is optional; however it is Bield policy that this must be used. A step by step 'quick quote' guide can be found [here](#).

Any user not currently on PCS should register; the Procurement Manager will then set the necessary permissions.

#### Evaluation/Scoring

In the Procurement Journey there are some example scoring methodologies provided, for evaluating supplier/contractor bids. Bield's policy is to use a 0-4 scoring methodology

#### Templates

The Procurement Journey contains a number of templates; Bield specific templates are available. These should be used in place of those contained within the Procurement Journey.

#### Property Specific Requirements

All contractors awarded a property-related contract will have to complete the Contractor Assessment Form prior to the contract commencing. Further information can be found in the [Property Services Policy](#).

[CLICK HERE FOR PROCUREMENT JOURNEY ROUTE 1](#)



## Appendix 4 Route 2 Tender procedure

For all procurement between £50,000 (£250,000 for works) and the GPA Threshold <https://www.procurementjourney.scot/additional-resources/thresholds> Route 2 of the Scottish Government's Procurement Journey is to be followed.

It is important that the Procurement Manager is notified of any procurement activity within this value range. The Procurement Manager will:

- Give advice and guidance in relation to the process
- Provide relevant documentation and templates as required
- Include the procurement in Bield's Contract Delivery Plan
- Ensure that relevant information is captured and reported
- Once awarded, ensure the contract is included in Bield's Contract Register

### Additional Information

#### Use of Public Contracts Scotland

The Procurement Journey indicates that use of Public Contracts Scotland (PCS) is optional, however it is Bield policy that this must be used. Any user not currently on PCS should register; the Procurement Manager will then set the necessary permissions.

#### Evaluation/Scoring

In the Procurement Journey there are some example scoring methodologies provided, for evaluating supplier/contractor bids. Bield's policy is to use a 0-4 scoring methodology which can be found [here](#). An evaluation matrix template can be found [here](#).

#### Templates

The Procurement Journey contains a number of templates; Bield specific templates are available. These should be used in place of those contained within the Procurement Journey.

#### Property Specific Requirements

All contractors awarded a property-related contract will have to complete the Contractor Assessment Form prior to the contract commencing. Further information can be found in the [Property Services Policy](#).

[CLICK HERE FOR PROCUREMENT JOURNEY ROUTE 2](#)



## Appendix 5 Route 3 GPA Tender Procedure

For all procurement above GPA threshold <https://www.procurementjourney.scot/additional-resources/thresholds>, Route 3 of the Scottish Government's Procurement Journey is to be followed. The Procurement Manager is to lead, from a procurement point of view, on all activity above this threshold. The only exceptions to this would be where there is not capacity within the organisation; or where there is a requirement for more specialist expertise. In such cases, use of external consultants will be considered, this must be approved by Senior Management Team and services procured in line with the requirements of this Policy and Procedures.

The Procurement Manager will:

- Include the procurement in Bield's Contract Delivery Plan
- Coordinate the Procurement Process
- Establish a Working Group/Evaluation Panel
- Publish all contract notices and documentation
- Collate scoring information from Evaluation Panel
- Carry out cost analysis
- Issue all Intention to Award, Contract Award and Regret Letters
- Ensure that relevant information is captured and reported
- Once awarded, ensure the contract is included in Bield's Contract Register

### Additional Information

#### Evaluation/Scoring

In the Procurement Journey there are some example scoring methodologies provided, for evaluating supplier/contractor bids. Bield's policy is to use a 0-4 scoring methodology which can be found [here](#). An evaluation matrix template can be found [here](#).

#### Templates

The Procurement Journey contains a number of templates; Bield specific templates are available. These should be used in place of those contained within the Procurement Journey.

#### Property Specific Requirements

All contractors awarded a property-related contract will have to complete the Contractor Assessment Form prior to the contract commencing. Further information can be found in the [Property Services Policy](#).

[CLICK HERE FOR PROCUREMENT JOURNEY ROUTE 3](#)



## Appendix 6 Procurement Route Matrix

### Procurement Thresholds and Procedures for Goods/Services

Total Value of Contract (Exc. VAT)	Procurement activity	Typical timescales	Tender Report Required	Scottish Government's Procurement Journey
Under £3000	Direct instruction but seeking value for money and considering current market prices.	N/A	No	Detailed guidance and template documents can be found in Route 1 of the Procurement Journey.  <a href="https://www.procurementjourney.scot/route-1">https://www.procurementjourney.scot/route-1</a>
£3,001 - £10,000	Seek three quotations from competent suppliers. Must be able to demonstrate value for money. If only one returned quote, consider requesting at least one further quote.	N/A	No	
£10,001 - £50,000	Contact Procurement Manager  Competitive tender through the PCS Quick Quote function.  In some circumstances direct award up to £50k may be made by using single tender justification form where appropriate and advise sought from Procurement Manager. Manually add contract award to contracts register	7 – 30 days	Yes	
£50,001 - £213,447 (GPA Threshold)	Contact Procurement Manager. Competitive tender through the PCS portal inviting suppliers to tender. Award criteria and weightings decided by Contract Manager in liaison with Procurement Manager. Contract award must be added to contracts register.	1 - 3 months	Yes	Detailed guidance and template documents can be found in Route 2 of the Procurement Journey.  <a href="https://www.procurementjourney.scot/route-2">https://www.procurementjourney.scot/route-2</a>



Above £231,447 (goods/services)	Full GPA tender using Public Contract Scotland for issuing contract notice/SPD/ITT/clarifications/contract award notices.	4 - 6 months	Yes	Detailed guidance and template documents can be found in Route 3 of the Procurement Journey. <a href="https://www.procurementjourney.scot/route-3">https://www.procurementjourney.scot/route-3</a>
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## 2 Procurement Thresholds and Procedures for Works

Total Value of Contract (Exc. VAT)	Procurement activity	Typical timescales	Tender Report Required	Scottish Government's Procurement Journey
Under £20,000	Request two quotes to insure value for money and consideration for market conditions.  In some circumstances direct award up to £20k may be made by using single tender justification form where appropriate and advise sought from Procurement Manager. Manually add contract award to contracts register	N/A	No	Detailed guidance and template documents can be found in Route 1 of the Procurement Journey.  <a href="https://www.procurementjourney.scot/route-1">https://www.procurementjourney.scot/route-1</a>
£20,001 - £50,000	Three written quotations requested with set return date deadline demonstrating value for money.  In some circumstances direct award up to £50k may be made by using single tender justification form where appropriate and advise sought from Procurement Manager. Manually add contract award to contracts register	1-30 days	No	
£ £50,001 - £250,000	Competitive tender via Public Contracts Scotland Quick Quote or Open Procedure can be used	7 – 30 days	Yes	



£ £250,000 - £4,447,447	Contact Procurement Manager. Competitive tender through the PCS portal inviting suppliers to tender. Award criteria and weightings decided by Contract Manager in liaison with Procurement Manager. Contract award must be added to contracts register.	1 - 3 months	Yes	Detailed guidance and template documents can be found in Route 2 of the Procurement Journey. <a href="https://www.procurementjourney.scot/route-2">https://www.procurementjourney.scot/route-2</a>
£4,447,447 (works)	Full GPA tender using Public Contract Scotland for issuing contract notice/SPD/ITT/clarifications/contract award notices.	6-12 months	Yes	Detailed guidance and template documents can be found in Route 3 of the Procurement Journey. <a href="https://www.procurementjourney.scot/route-3">https://www.procurementjourney.scot/route-3</a>





**Speaking your language - we are happy to translate our policies on request.**

يمكن ترجمة سياساتنا عند الطلب  
إذا كنت بحاجة إلى مساعدة ، فيمكننا توفير مترجم

**Nasze zasady mogą być przetłumaczone na żądanie.  
Jeśli potrzebujesz pomocy, możemy zapewnić tłumacza**

**我们的政策可以应要求翻译。  
如果您需要帮助，我们可以提供翻译**

بماری پالیسی کا درخواست پر ترجمہ کیا جاسکتا ہے۔  
اگر آپ کو مدد کی ضرورت ہو تو ہم ایک ترجمان فراہم  
کرسکتے ہیں