



Sustainable Procurement and Purchasing Policy

Approved by Board of Trustees on: May 23rd 2023

To be reviewed every three years

Next review due 2026

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Lead Trustee: Steve Winningham

PDT's Procurement Policy

This policy sets out the process for the procurement of all works and professional services to be delivered by consultants, contractors and suppliers.

All procurement will be conducted in line with relevant UK and other regulations and legislation for buying goods and services.

From time to time, PDT will be required or have to tender for specific supplies or services. Decisions on when services or supplies should be tendered rests with Senior Managers and the Senior Finance Officer.

Where obtaining quotes is required by a specific funder, responsibility for obtaining quotes will lie with the named project manager for the specific grant.

PDT does not have a preferred supplier list and quotes can be obtained from wherever is most practicable as long as the factors listed below and PDT's sustainability procurement policy are taken into account. Preference shall be given to local contractors and suppliers where this is reasonably economical.

PDT will not evaluate a tender for supplies or services purely on price. We are looking for the best balance of quality and price. Suppliers and their tenders will be evaluated on a variety of factors, including:

- financial viability
- quality
- competence
- experience
- technical merit and backup
- delivery date
- adherence to PDT's policies and protocols
- corporate social responsibility and sustainability policies
- integrity
- innovation
- communication

PDT's tendering process

The precise process to be followed will depend on the nature of services to be procured, for example in relation to the relative weight to be given to price and quality. However, the following requirements will be adhered to, as determined by the value 'band' of the services involved.

Band A: value of services below £10,000 (excluding VAT)

No requirements for a formal tendering process. However, we will seek more than one quotation and the award of any contract must secure value for money for PDT.

Band B: value of services between £10,000 and £49,999 (excluding VAT)

The services required will be specified in written briefs, to be provided to those wishing to apply to deliver the work.

Written tenders or quotes must be obtained from at least three different consultants or suppliers.

Each tender will be assessed against criteria related to the written brief, and a decision to award the contract made as appropriate based on quality and price. Reasons for the decision must be recorded in writing and kept on file.

Band C: value of services above £50,000 (excluding VAT)

As for band B. Additionally:

- 1) the opportunity should be advertised; and
- 2) a report must be prepared on all tenders evaluated and the reasons for selection, including the full rationale if the lowest tender has not been selected. This report should provide proof that a competitive tendering process has been followed.

Band D: value of services above EU procurement thresholds (excluding VAT)

The process outlined for band C must be followed in a way that also complies in full with relevant EU requirements, including advertisement in the European Journal. Guidance on this can be found on the Cabinet Office website.

PDT's sustainable procurement policy is:

- To comply with environmental legislation and regulatory requirements
- To promote environmental awareness amongst suppliers and contractors
- To buy less environmentally damaging products and services
- To consider environmental factors when making procurement decisions and
- To develop awareness of environmental issues within PDT in line with our environmental policy.

Purchasing Policy

Purpose

The purpose of this policy is to establish guidelines for the purchase of goods, services/facilities and equipment at Paddington Development Trust (PDT). This policy will

better allow PDT to standardise purchasing of equipment and services / facilities purchased, resulting in better pricing, and improved delivery of support.

Scope

This policy covers all goods, services/facilities and equipment purchased with PDT funds. Specifically, the following PDT resources are within the scope of this policy:

- Desktops, laptops, personal digital assistants, cell phones, and servers.
- Software running on the devices mentioned above.
- Peripheral equipment, such as printers and scanners.
- Cables or connectivity-related devices.
- Audio-visual equipment, such as projectors.
- Stationary
- Training Services
- Office Equipment
- Technical Support

All equipment / goods purchased by PDT funds are the property of PDT. Only PDT has the right to designate use of specific equipment purchased via its restricted fund resources to specified projects.

General Procedures

- If an employee or department wishes to purchase goods, services/facilities or equipment, they should in the first instance speak to their line manager.
- All purchase requests for goods, services/facilities or equipment must first be approved by a line manager or designated budget holder before purchase.
- All requests should be submitted to the Finance department for final purchase approval.
- Line Managers, budget holders and the finance department will take responsibility for agreeing how payment will be made – pro-forma invoice, company credit card, BACS, cheque etc.
- Any requests for items over £5,000 pounds and outside of approved budget lines must have the prior approval of the Board of Trustees, or in emergency circumstances Chair's action.