Volunteer It Yourself (VIY) Procurement Policy

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Revised by	**Dee Dee Whelan, Ed Sellwood**
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Introduction and background

This document summarises the process that we, at Volunteer It Yourself (VIY), use when looking to purchase goods, works and services.

As a community interest company, we work with a number of different corporate and grant supporters and funders, so it is imperative that we purchase goods, works and services in a responsible manner, complying with government regulations, ensuring that all external spend has been transparent, diligent and fair, and has achieved value for money.

Purpose

The aim of this policy is to ensure that all purchases made by VIY staff conform to government regulations, and embrace our management principles (and Financial Probity Policy). A key part of this policy is a process which facilitates and supports those team members charged with carrying out any procurement task.

Scope

Procurement covers the process of acquiring goods, works and services (including consultancy services) from third parties. It ranges from the initial concept and definition of a business need through to the end of the useful life of a purchased asset/item or service contract.

Policy/tendering process

As a community interest company, it is vital that VIY observes the highest standards of integrity when dealing with all matters concerning the procurement of goods and services. In particular, when awarding work/contracts by tender, VIY must:

- Be fair, efficient, transparent, firm, consistent and courteous
- Make available as much information as suppliers need to respond to the tendering process, i.e. fully detail the opportunity, list what is required of interested parties and be clear on key dates and deadlines (including how long the opportunity is available for)
- Be transparent with respect to any conflict of interest (e.g. relationships with potential suppliers), disclosing these at the earliest opportunity

- Explain how successful candidates will be chosen (in most cases via letter/email) and notify the outcome of tenders promptly and, within the bounds of commercial confidentiality, debrief winners and losers on request on the outcome of the tendering process to facilitate better performance on future occasions
- Maintain records of all tender related correspondence (from all parties)
- Achieve the highest professional standards in the awarding and management of contracts
- Respond promptly, courteously and efficiently to suggestions and enquiries
- Respect the confidentiality of information relating to a tender or contract and never use the information for personal gain

Not only must VIY be seen to be open and accountable in all its transactions, but we must also ensure that we operate fairly and efficiently and make best use of any corporate or grant money awarded to us.

All procurement exercises should provide best value

Best value, or value for money, means taking into account the best combination of 'whole-life cost' and quality necessary to meet our needs, and not simply on initial costs. See examples below (as and where relevant):

- Whole-life costs
- Warranty or maintenance costs
- Disposal cost of any goods or materials
- Travel/accommodation costs
- Related training and development costs
- Environmental impact (please refer to the VIY Environmental Sustainability Policy for more information)
- Equality and diversity (we actively encourage working with like-minded organisations that demonstrate best practices with respect to equality and diversity)
- Social impact

The most economically advantageous tender or purchase is defined as the right balance between the total cost and quality of the product or service being purchased. The split of the criteria will depend on the subject matter and complexity of the requirement, and is judged on a case-by-case basis.

Procurement procedure in relation to contract size

Excluding VAT, these are as follows:

£0 - £2,499	Direct award (one written quotation required)
£2,500 - £24,999	Three written quotes must be sought (as a minimum, and each supplier should be a different business)
£25,000+	Formal tender process

Roles and responsibilities

Spending limits/approvals, authorisation

All payments up to £2,500 need to be approved by a Programme Manager or Programme Director, whilst payments over £2,500 need to be approved by a Company Director.

NB: For our programme management teams, all project expenditure is governed by VIY's 'Project Spending Rules' to which all VIY staff must adhere.

Company debit cards

Company debit cards are only held by Company Directors and Programme Managers and therefore all payments made by a company debit card must be checked and approved by a Company Director or Programme Manager. NB: Debit card statements are checked by the Company Directors for accuracy on a monthly basis.

Cheques

All cheques have to be countersigned by two Company Directors.

Cash payments

We do not make cash payments/petty cash transactions with company funds. NB: Team members do sometimes make cash payments with their own money, which are then claimed back within their expenses.

BACS payments and monitoring invoices

The majority of our payments are made via BACS against invoices received (and all suppliers are required to submit detailed invoices).

All outgoing payments are checked/reviewed by the project/programme teams, Book-keeper and ultimately the COO and compared to invoices. We also specifically monitor the following:

- Duplicate invoices
- Invoices for the same amount
- New suppliers/payees
- Multiple invoices from the same supplier over a short time period

Project/Programme Managers are briefed on what a supplier invoice should include (i.e. the correct date, an invoice number, sufficient detail/descriptions re what project/s the work relates to) – and suppliers are briefed/reminded to submit detailed and accurate invoices.

Purchase order process

We do not operate a purchase order process. Any purchase/invoice must however reference the person at VIY who has overseen that purchase (which assists with the reconciliation process). Suppliers must also reference the project or programme that their invoice relates to.

Contracting

Principles of our contracting process

- All service related purchases (and goods or works related purchases in excess of £2,500) must be covered by a contractual agreement between the supplier and VIY
- The contracting of services is the responsibility of a Company Director or Programme Director
- We have four types of contract, (a) General/written contracts, (b) Memorandums of Understanding (MoU), (c) Partnership Agreements, (d) Service Level Agreements (SLAs), all of which need to be approved by a Company Director or Programme Director
- The optimum contract period will depend on the nature of the services being provided, the risk to VIY and supplier, market conditions, and the whole-life cost of the goods/services
- A supplier's Health & Safety Policy, as well as their insurance indemnity limits, will be requested as part of the contracting process

Contract reviews / unsatisfactory supplier performance

Contracts are reviewed on a regular basis (timings of which are dependant on the type and length of contract). In instances where a supplier fails to meet its contractual obligations, or has not addressed any required action highlighted at a review meeting, VIY may decide to terminate the contract. In this case, the decision is made by an SLT member (who should take into consideration the lead time to change over supplier if there is an embedding period).

Market research

Prior to the purchasing of goods, works or services, team members are required to undertake market research within the supply market in order to determine an approximate cost and to obtain general advice and/or information about their requirement. This is to ensure value for money on any given purchase.

Procurement/financial control responsibilities

Our Board has ultimate responsibility for financial controls across the company. We have systems and processes in place which involve most of the organisation (which are detailed in the VIY Financial Controls document) to protect our assets, mitigate the risk of any financial related wrong-doing and fraud, and ensure that we maintain robust financial records and reports.

These systems and processes are reviewed, on an annual basis, by both the Board and VIY's external Advisory Board.

Financial control duties are delegated by the Board to multiple employees to avoid the risk of having one person in charge of all business financials.

We also work with external chartered accountants (TWP Accounting) who manage our payroll and create our year-end accounts (with the input/support of our Book-keeper and the Board). TWP also audits expenditure on our programmes when stipulated by clients.

References and relevant legislation

Gov.uk - UK Shared Prosperity Fund: Procurement
https://www.gov.uk/guidance/uk-shared-prosperity-fund-procurement-8

This Procurement Policy is in-line with the public procurement guidance included in the above, as well as the following legislation:

Public Contracts Regulations 2015, Modern Slavery Act 2015 and Equality Act 2010.

For any queries regarding this policy, or if you require assistance, please contact the COO who will be happy to assist you with your enquiry.