



# **Annual Procurement Strategy 2026/27**

**March 2026**

**Table of Contents**

Introduction ..... 1

Procurement Vision ..... 1

Key Drivers Shaping Procurement..... 1

Strategic Aims..... 2

Strategic Objectives ..... 2

Procurement Objectives..... 3

Value for Money..... 3

Equal and Non-Discriminatory Treatment..... 3

Transparency and Proportionality ..... 4

Sustainability / Community Benefits..... 4

Consultation / Engagement..... 4

Fair Work Practices..... 4

Health & Safety..... 4

Fairly and ethically traded goods ..... 5

Ensuring prompt payments to contractors and sub-contractors..... 5

Strategy Ownership, Structure, Roles & Responsibilities..... 5

Conclusion ..... 5

**Annex A - Procurement Thresholds and Timescales ..... 6**

Annex B – PHA Planned Procurement 1 April 2026 – 31 March 2027 ..... 8

Annex C – PHA Procurement Strategy Action Plan 1 April 2026 – 31 March 2027 ..... 11

## Introduction

The Procurement Strategy for Partick Housing Association Limited (PHA), and its subsidiary Partick Works Limited (PWL), provides a framework for future planning for all purchases across the organisation. This Strategy covers the period 1 April 2026 – 31 March 2027. It has been informed by and prepared in line with the Procurement Reform (Scotland) Act 2014 (the Act).

This Strategy will support the strategic objectives set out within our Group Corporate Plan, which are as follows:

- deliver the right homes, services and environment for our customers;
- work in partnership with others to achieve the best outcomes, grow and diversify;
- engage with customers and partners to tailor our services and deliver on our promises; and
- deliver innovative ways of working, new opportunities, positive outcomes and value for money.

We will review and update this Strategy annually to ensure compliance with relevant legislation, our goals and stakeholder feedback.

Procurement begins when we identify a need to buy and is the process of acquiring goods, services and works from external suppliers or in-house providers at best whole-life costs, in the right quantity, at the right quality, at the right time, in the right place. It provides the best service for the benefit of PHA and our customers and continues throughout the management of the contract.

## Procurement Vision

To perform effectively through sustainable procurement practices for the benefit of PHA, our customers, the communities that we serve and our wider stakeholders.

PHA is a 'contracting authority' for the purposes of the Act and the Public Contracts (Scotland) Regulations 2015 (the Regulations). Both the Act and the Regulations specify legal procedures which we must follow when buying supplies, services and works over certain estimated contract values.

Where a contracting authority has an anticipated annual spend of more than £5m on contracts regulated by the Act (regulated contracts), it is obliged to prepare and publish a procurement strategy. During 2026/27 we anticipate procurement activities with an estimated value that will exceed £5m and so will publish a procurement strategy and notify Scottish Ministers accordingly.

## Key Drivers Shaping Procurement

The Procurement function has responsibility to facilitate the delivery of savings and efficiencies through good procurement practice across our organisation whilst mitigating operational, commercial and compliance risk.

There are several key drivers influencing and shaping procurement for organisations such as PHA. These are in the main legislative but must also be driven by our need to remain viable and provide services which are affordable and cost effective to our customers.

Legislatively our procurement is guided by:

- Procurement Reform (Scotland) Act 2014;
- Public Contracts (Scotland) Regulations 2015; and
- Procurement (Scotland) Regulations 2016.

All procurement activity must comply with the principles of:

- accountability;
- integrity;
- efficiency;
- openness;
- fairness;
- transparency;
- equal treatment and non-discrimination; and
- proportionality.

To meet these standards we will ensure that all staff with purchasing responsibilities understand their responsibility in applying the key principles of public procurement. This is in the delivery of value for money, appropriate quality and service to meet business needs and appropriate governance.

### **Strategic Aims**

The aims of this Strategy are to:

- enable procurement to contribute to our overall vision and to provide efficiencies to help us deliver our key priorities and front-line services;
- procure goods and services in a lawful and ethical manner that complies with public procurement requirements and which encourages participation and sustainable economic growth;
- ensure that procurement initiatives deliver for us best value, balancing cost and quality of service; and
- provide a framework for us to develop a plan to achieve continuous improvement in our procurement activity.

### **Strategic Objectives**

The strategic aims of this Strategy will be supported by the following strategic objectives:

- Ensure our procurement activities across PHA, including tendering, awards, contract management and reporting procedures, are in accordance with legislative and ethical requirements and comply with good procurement practice.
- Ensure that procurement initiatives consider whole-life costs and deliver best value for money for PHA.
- Ensure effective contract and supplier management so that business is conducted professionally and contractors comply with environmental, social and employment law throughout the life of a contract.

- Investigate joint working initiatives and opportunities where appropriate.
- Open opportunities for most procurement activity to suppliers (in particular, small and medium-sized enterprises (SMEs)) by advertising tender opportunities for regulated contracts on the Public Contracts Scotland (PCS) website, where possible.
- Ensure that procurements regulated by the Act (regulated procurements) are conducted in accordance with this strategy, as far as reasonably practicable.

### **Procurement Objectives**

PHA will consider this Procurement Strategy, our Procurement Policy and refer to our Procurement Manual during any procurement activity, taking account of the Group Standing Orders and Group Financial Regulations as necessary. We will align, monitor and review our procurement thresholds accordingly.

Contracts must be awarded through effective competition unless there are exceptional reasons to the contrary. We aim to be clear and concise in our procurement activities.

Each regulated procurement will record details of how we have met the key standards of value for money, equality, sustainability, transparency, health and safety, community consultation, fair and ethically traded goods, fair working practices and community benefits. This information will be used to inform our annual procurement report.

### **Value for Money**

Our procurement activity will be focused on the delivery of value for money; conducted to high professional standards, in accordance with relevant guidance and to the relevant legal requirements; and overseen by appropriately trained and authorised staff to ensure that we comply with legal requirements.

The balance of value for money will be considered on a case-by-case basis, whilst ensuring consistency and transparency in procurement activity. We will select the most economically advantageous tender, considering an appropriate balance between price and quality.

We will pursue value for money through effective contract monitoring, management and performance reporting.

### **Equal and Non-Discriminatory Treatment**

PHA considers equality throughout our procurement activity so that we comply with the Equality Act 2010 and the Equality Act 2010 (Specific Duties) (Scotland) Regulations 2012.

We use standard tender documentation, drafted in clear and precise language, to allow all reasonably well-informed and normally diligent tenderers to interpret the documentation in the same way.

Contracts will be split into smaller lots when appropriate, to maximise competition, minimise purchasing cost and optimise efficient allocation.

## Transparency and Proportionality

PHA will continue to use modern methods of electronic procurement, in particular the PCS website, to support process improvements across our business.

We will ensure that clear and precise language is used throughout our procurement activity and make use of inclusive, not overly burdensome, and known award criteria to ensure transparency from the start of a procurement process until contract award.

Once implemented, the actions required under this Strategy should evidence that we ensure compliance with legislative and best practice requirements, whilst demonstrating our commitment to ensuring transparency, equal treatment, non-discrimination and proportionality in our procurement activity.

## Sustainability / Community Benefits

PHA will have regard to sustainability and the statutory guidance on the 'sustainable procurement duty' under the Act at the outset of, and during, any regulated procurement activity.

We will continuously review and embed into our contract requirements, ways of improving contract performance.

We will explore opportunities for innovation and consider the tools provided by the Scottish Government in relation to the sustainable procurement duty, for example the Scottish Government prioritisation tool, life-cycle mapping, sustainability test and the Scottish flexible framework.

Community benefit clauses will be incorporated into all contracts with a value more than £4 million. Such clauses may include contractual requirements relating to training and recruitment, the availability of sub-contracting opportunities or otherwise intended to improve the economic, social or environmental wellbeing of our operating area in a way which is additional to the main purpose of the contract in which the requirement is included.

## Consultation / Engagement

Consultation on individual contracts will vary depending upon the nature of the works and services being procured. However we will engage with our stakeholders in our procurement activity to understand the needs of our operating area and analyse the impact of our Procurement Strategy.

## Fair Work Practices

PHA will take account of statutory guidance on the selection of tenderers and award of contracts addressing fair work practices, including the living wage, in our procurement activity.

## Health & Safety

Tender evaluations will include criteria promoting compliance with Health & Safety at Work Regulations, customer service requirements and, when appropriate and relevant, will include Corporate Social Responsibility criteria.

We will ensure that any measures taken to promote the compliance of health and safety requirements in our procurement activity are relevant, proportionate and not overly burdensome. The specific health and safety criteria set down by us will vary depending upon the goods, services or works being purchased and will be considered on a case-by-case basis.

### **Fairly and ethically traded goods**

Where relevant, we will consider how, by including fair and ethical requirements, we can promote fairness, dignity and the rights of workers and producers in international trading.

We will, if appropriate, include fair and ethical trading requirements in contract award criteria, subject always to the requirements of the Act and the Regulations.

### **Ensuring prompt payments to contractors and sub-contractors**

PHA is committed to paying contractors within 30 days of invoicing, which is a provision within our standard terms and conditions. We will remind contractors of their obligation to pay sub-contractors within 30 days of invoicing.

### **Strategy Ownership, Structure, Roles & Responsibilities**

The Procurement Strategy, Procurement Policy and the Procurement Manual, and all other related guidance documents, will be circulated to the Leadership Team and Management Team. Procurement activity will take place under the direction of our Investment Director. All directors and managers will work with the Investment Director to ensure that our policies and procedures comply with the Act, Regulations, Group Standing Orders and Group Financial Regulations.

We currently operate a decentralised approach to purchasing activities. Each team manages its individual budget and makes purchasing decisions aligned with business needs. Every team has staff responsible for purchasing at an operational level.

The Leadership Team will be responsible for ensuring that all purchasers within their directorate are aware of and comply with relevant procurement processes and procedures to ensure best value for money.

Purchasers (staff with purchasing authority) will be responsible for complying with relevant purchasing processes and procedures but, if necessary, should seek clarification or assurance from the Investment Director and Finance Team throughout the procurement process.

### **Conclusion**

The Procurement Strategy provides us with a framework for implementing processes and procedures to ensure best practice and best value in our procurement activity.

To achieve this and continuous improvement in purchasing, it is important that all senior people across PHA support this approach and how we operate is cascaded and applied consistently across the business.

## Annex A - Procurement Thresholds and Timescales

Estimated Value (excl VAT)	Definition	Tender Process	Tender Activity	Minimum Advertising Requirements	Internal Guide Timescales
£0 - £999	Works, Services and Supplies	Work may be authorised within individual officer limits and contractor may be directly engaged without any form of public procurement exercise.	Ability to directly appoint a supplier.	Direct approach to suppliers	1-2 weeks
£1,000 – £14,999	Works, Services and Supplies	Minimum of 3 competitive quotations to be invited using standardised documentation and processes (e.g. a specification and return date to be sent to all contractors being asked to provide costs. Lowest priced or best value contractor to be appointed).	Ability to directly appoint a supplier.	Direct approach to suppliers	1-2 weeks
£15,000 - £49,999	Work, Services and Supplies	Quick Quote.	Use of Invitation To Tender (ITT) document incorporating price/quality ratio and tender questionnaire document.	On-line Quick Quote using the PCS website	Minimum 2 weeks
£50,000 - £1,999,999	Works	Quick Quote (Note: Internal limit of £150k for Works via Quick Quote. Can be increased but only with Leadership Team approval).	Use of ITT document incorporating price/quality ratio and tender questionnaire document.	On-line Quick Quote using the PCS website	Minimum 4 weeks
£50,000 to £115,633	Services and Supplies	Formal Tender Process.	Use of Single Procurement Document (SPD) and ITT document incorporating price /quality ratio.	To be advertised on the PCS website	6-8 weeks

<b>Estimated Value (excl VAT)</b>	<b>Definition</b>	<b>Tender Process</b>	<b>Tender Activity</b>	<b>Minimum Advertising Requirements</b>	<b>Internal Guide Timescales</b>
£2,000,000 to £4,447,447	Works	Formal Tender Process	Use of SPD and ITT document incorporating price /quality ratio.	To be advertised on the PCS website.	6-12 weeks
£115,663 and above	Services	Formal Tender Process	UK Government Regulations.	To be advertised on PCS and Find-A-Tender Website.	12-18 weeks
£4,447,447 and above	Works	Formal Tender Process	UK Government Regulations.	To be advertised on PCS and Find-A-Tender Website.	12-18 weeks

## Annex B – PHA Planned Procurement 1 April 2026 – 31 March 2027

<b>Contract</b>	<b>Estimated Value (excl VAT)</b>	<b>Procurement Method</b>	<b>Job Role and Delegated Purchasing Authority</b>
Construction Works 1660 Great Western Road	£3.6m	Framework/ PCS	Investment Director
Kitchen Replacement Installation	£1.5m over 3 years	Framework/ PCS	Asset Manager/ Investment Director
Kitchen Supplies	£0.750m over 3 years	Framework/ PCS	Asset Manager/ Investment Director
Buildings Insurance Cover	£0.800m	PCS	Finance Director
Stock Condition Surveys	£0.100m	Framework/ PCS	Asset Manager/ Investment Director
Gas Servicing and Maintenance	£0.650m over 4 years	Framework/PCS	Property Services Manager /Operations Director
Damp and Mould and Repairs	£0.300m over 3 years	PCS	Property Services Manager /Operations Director
Centurion Way – Communal Heating System Servicing	£0.055m	PCS	Property Services Manager /Operations Director

**Annex C – PHA Procurement Strategy Action Plan 1 April 2026 – 31 March 2027**

<b>Ref</b>	<b>Objective</b>	<b>Lead</b>	<b>How?</b>	<b>Target Date</b>	<b>Comments</b>
<b>1.1</b>	<b>Provide Procurement refresher training for procuring staff members</b>	Investment Director/ Corporate Services Director	Identify training resource and deliver relevant training.	Autumn 2026	Ensure appropriate levels of training for purchasing staff.
<b>1.2</b>	<b>Provide refresher training to ensure procurement activity is accurately recorded on Homemaster system</b>	Asset Manager/ ICT Manager	Deliver training to key staff	December 2026	Ensure appropriate training is provided to key staff who undertake procurement activities along with procedural notes and routine sample checking.
<b>1.3</b>	<b>Participate in Procurement Improvement Programme</b>	Investment Director	Engage with Scotland Excel. Identify staff resource to co-ordinate self-assessment exercise.	Autumn 2026	Assess our procurement performance and identify areas of improvement