



Queen Margaret University

EDINBURGH

Procurement Strategy

2020-2025

Status	Final
Owner	Finance
Source location	Finance Web Pages
Endorsed	Executive Board
Publication	July 2020 (revised July 2021)
Next Review Date	May 2022

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1. Executive Summary

The Queen Margaret University Procurement Strategy is aligned with the University strategic goals, established collaborative initiatives and necessary regulatory compliance with the Procurement Reform (Scotland) Act 2014. The approved Strategy is the culmination of consultation and engagement with different stakeholder groups affected by the institutional approach to procurement. Through this consultation, the Procurement Strategy benefits from exposure to both internal and external scrutiny. This strengthens the understanding of the Strategy and the prospect of achieving its policies, aims and objectives.

2. Strategic Context

The Procurement Strategy sets out the strategic institutional approach to procurement within a challenging economic, legislative and regulatory environment, including support for University policies. The statements within section 5 demonstrate how the University will deliver the requirements of the Procurement Reform (Scotland) Act 2014. Its focus is on all staff involved in buying goods and services on behalf of Queen Margaret University, including management staff responsible for authorising and monitoring transactions.

3. Procurement Mission Statement

Queen Margaret University is committed to obtaining value for money in all of its transactions, and in conducting its daily business, staff will consider the institution's wider responsibilities in terms of legal, moral, social, economic and environmental impact. Effective procurement will support the key institutional goals within the QMU Strategic Plan 2020-2025.

4. Strategic Objectives

The procurement objectives are as follows:

- Support Academic and Professional Services Departments to enhance the learning experience, for the many and diverse needs of stakeholders, by providing innovative solutions for their procurement decisions. **[Strategic Goals – Provide distinctive, accessible, high quality education and Deliver transformative research and innovation]**
- Embed sound ethical, social and environmental policies within the Institution's procurement function, respond to the global climate emergency and to ensure compliance with relevant Scottish, UK and EU legislation in performance of the sustainable procurement duty. **[Strategic Goal - Embed sustainability across our portfolio and practices]**
- Promote the delivery of value for money through good procurement practice and optimal use of procurement collaboration opportunities working with the supply chains to ensure continued value, managed performance and minimal risk throughout the life of contracts for the benefit of customers and students. **[Strategic Goal – Invest in the long term future of the University]**
- Sustain and further develop partnerships within the sector, with other publicly funded and professional bodies, and where appropriate with supply markets that will yield intelligence, innovation and deliver value to users of procurement. **[Strategic Goal – Seek out partnership and collaboration]**
- Develop management information to measure and improve procurement and supplier performance, assisting key stakeholder areas in meeting their requirements for best value goods and services. **[This enables the University to ensure that the five objectives set out above are being met, and thus supports each of the strategic goals noted]**

5. Compliance with the Procurement Reform (Scotland) Act

The inclusion of the following statements in the University Procurement Strategy is mandatory to demonstrate how the University will deliver the requirements of the Procurement Reform (Scotland) Act.

Statement on the University's policy on the use of community benefit requirements.

For every procurement over £4m, the institution will consider how it can improve the economic, social or environmental wellbeing of its area through inclusion of community benefit clauses, to assist with its strategic objectives of seeking out partnership and collaboration and embedding sustainability across our portfolio and practices. Such improvements could be implemented through mandated delivery of training opportunities or subcontracting opportunities within the University's operating area. Where possible and proportionate, the University will also look to include such clauses in procurements below the £4m threshold.

Statement on the University's policy on consulting and engaging with those affected by its procurements.

For each procurement, the institution will consider the community affected by the resultant contract and ensure any affected organisations/persons are consulted (e.g. impact on service for students, or a local contract that could be combined with another similar institution's needs). Such consultation will always be on a scale and approach relevant and proportionate to the procurement in question.

Statement on the University's policy on the payment of a living wage to persons involved in producing, providing or constructing the subject matter of regulated procurements.

The institution recognises the values of a well-motivated and dedicated workforce both in its own organisation and in those of its suppliers.

As an accredited Living Wage employer the institution will encourage the fair work practices of suppliers in its procurements, including the application of the Living Wage.

Statement on the University's policy on promoting compliance by contractors and sub-contractors with the Health & Safety at Work, etc. Act 1974 and any provision made under that Act .

The institution is committed to contracting only with suppliers that comply with all appropriate and relevant legislation, including Health and Safety legislation and relevant University procedures. Where appropriate, and on a contract by contract basis, the institution will assess the legislation applicable to a procurement and take steps to ensure bidders comply with such legislation and relevant procedures. Where proportionate, the institution may also assess a subcontractor's compliance with specific legislation.

Statement on the University's policy on the procurement of fairly and ethically traded goods and services.

The University's catering is Fair Trade and this supports the sourcing of goods that are fairly and ethically traded.

Where relevant it shall make use of appropriate standards and labels in its procurements to take account of fair and ethical trading considerations, and will consider equivalent offerings from suppliers in its tenders.

Statement on the University's policy on its approach to 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 (if applicable).

The University will find practical ways to supply healthy, fresh, seasonal, and sustainably grown food which represents value for money whilst improving the health, wellbeing and education of our teaching and learning communities, coupled with promoting the highest standards of animal welfare. The University will manage our entire catering provision to ensure affordable contracts are put in place, which meet the nutritional requirements and ethnicity mix for food for all users of our catering services.

Statement on the University's policy on how it intends to ensure that, so far as is reasonably practicable, the following payments are made no later than 30 days after the invoice (or similar claim) relating to the payment is presented.

- **Payments due by the University to a contractor.**
- **Payments due by a contractor to a sub-contractor.**
- **Payments due by a sub-contractor to a sub-contractor**

The institution complies with the Late Payment legislation and will review on a contract by contract basis whether such obligations should be enforced and monitored further down its supply chain.

Statement on the University's policy on how it intends to ensure that its regulated procurements will be carried out in compliance with the sustainable procurement duty.

The University will undertake regulated procurements in compliance with the sustainable procurement duty. The University will also seek to take account of climate and circular economy in its procurement activity. Consideration of environmental, social and economic issues and how benefits can be delivered through the procurement will be made, where appropriate and on a contract-by-contract basis. The institution will utilise available tools and systems such as Prioritisation, Life Cycle Impact Mapping, Sustainability Test, Flexible Framework, APUC's Code of Conduct, Sustain and Electronics Watch where relevant and proportionate to the scope of the procurement. The University shall identify appropriate contract areas where it can proactively engage with third sector bodies and supported businesses. The University has published and regularly updates its Modern Slavery and Human Trafficking Statement to comply with the Modern Slavery Act 2015.

Statement on the University's policy on how it intends to ensure that its regulated procurements will contribute to the carrying out of its function, achievements of its purpose and deliver value for money.

The University will analyse third party expenditure, identify 'GPA/OJEU regulated procurements' [goods and services worth more than £189,330; works worth more than £4,733,252] and 'lower value regulated procurements' [goods and services worth more than £50,000, works worth more than £2 million]. The University will sort regulated procurements into procurement categories. How these goods, services and works are bought - joint purchasing, use of local, regional and national framework agreements, consolidated contracting – will be subject to annual review with APUC and through user consultation, optimal category strategies agreed, sensible aggregation opportunities exploited, category and commodity strategies developed, recorded and the most appropriate procurement routes to market chosen. This will be done in consultation with key internal stakeholders to ensure that departmental and organisational aims and objectives are better achieved.

Statement on the University's policy on how it intends to ensure that it's regulated procurements will be carried out in compliance with its duty to treat relevant economic operators equally and without discrimination.

The University will conduct all regulated procurements in compliance with principles of equal treatment, non-discrimination, transparency, proportionality, mutual recognition and in line with the University's own procurement ethical code of conduct. It shall follow internal policies and guidance on Anti-bribery to ensure compliance with legislation including the Bribery Act 2010 and the Criminal Finances Act 2017. Queen Margaret University will utilise portals including PCS and PCS-T to publish its

procurement opportunities and shall strive to ensure appropriate use of lotting, output based specifications and clear evaluation criteria to ensure the procurement is accessible to as many bidders as possible. The University will ensure that it awards regulated procurements only to businesses [and sub-contractors] that are capable, reliable and, where relevant, that can demonstrate that they meet high ethical standards and values in the conduct of their business.

Statement on the University's policy on how it intends to ensure that its regulated procurements will be carried out in compliance with its duty to act in a transparent and proportionate manner.

In making regulated procurement contract awards, quality, risk and sustainability factors will be considered along with cost according to declared score weightings on a contract-by-contract basis. The University will make appropriate use of collaborative contracting arrangements (e.g. national, sectoral or local framework agreements or contracts) to deliver improved contract terms, contract and supplier management, sustainable procurement outcomes and value for money.

Queen Margaret University will take steps to make it easier for smaller businesses to bid for contracts. Whilst legislative constraints preclude preferences for only local suppliers, the University will ensure that through the structure of its tender documentation, the use of Public Contracts Scotland and Public Contracts Scotland – Tender, and the publication of a contracts register to highlight contracts for which local organisations may be interested in bidding for, it provides information to smaller, local providers and assists them to build capacity to be able to meet these requirements.

6. Annual Reporting

The University will produce annual reports on progress for each financial year against the Procurement objectives and publish this on the University website by November each year. This report will describe how the University has discharged its obligations under the Procurement Reform (Scotland) Act and how it has exercised discretion and judgement as permitted by the public procurement rules to secure strategic objectives in compliance with the Act.

The Annual Report will also include -

- a summary of the regulated procurements that have been completed during the year covered by the report,
- a review of whether those procurements complied with the University's Procurement Strategy,
- to the extent that any regulated procurements did not comply, a statement of how the University intends to ensure that future regulated procurements do comply,
- a summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report,
- a summary of any steps taken to facilitate the involvement of supported businesses in regulated procurements during the year covered by the report,
- a summary of the regulated procurements the University expects to commence in the next two financial years,
- such other information as the Scottish Ministers may by order specify

7. Strategic Ownership and Contact Details

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