



Strategic Procurement

Pre-Tender Policy

Policy Statement

Somer Housing Group and its Member Organisations will, on identifying the need to procure goods or services, determine the optimum sourcing solutions via appropriate market evaluations and undertake the measures necessary to ensure that the information provided to these potential Suppliers is accurate, comprehensive and a true reflection of the Business need.

Effective Date

January 2007

Scope

- This policy applies to Somer Housing Group staff and all its Member Organisations' (the Group) staff who are procuring goods through means of a quotation or competitive tender.
- This policy must be used in conjunction with the Standing Orders and Financial Regulations, which establish and identify the delegation of authority and associated spending limits.
- This policy forms a part of the complete Procurement Process and all other policies must be consulted when undertaking any procurement activity.
- The Group, as a Registered Social Landlord is governed by Public Law for the purpose of EU Procurement Law, and is fully committed to ensuring compliance with the requirements of the EU Public Procurement Directives, where applicable.

Principles

- The Group is committed to ensuring that, once identified, the need

for any product or service is appropriately assessed and evaluated on factors including, but not limited to, annual expenditure, the associated risk, scope and operational significance prior to approaching the market.

- The Group will ensure that sufficient resource is available to make certain that the data forming the basis of any tender or quote is accurate, up to date and representative of the Group's goals and visions. The collation of data will encompass usage patterns, training requirements and details of current practices as well as financial information.
- The Group undertakes to promote the formation of cross-functional User Groups at the outset of any review in order to ensure the accuracy of the information obtained. These Groups will allow individuals from all departments, who will be utilising the goods and/or service under-review, to raise matters for consideration.
- The recommended supply solution, as proposed by the User Group, will substantiate the Supplier's ability to meet the Group's need and thereby ensure utilisation of the Contract across the Group, where applicable. The purchasing of goods and/or services outside of the preferred supply route method will be reported and investigated.
- The Group's opening position and end objective of any review will be clearly defined and supported by the Business before the requirement is advertised. The Group members will be united in their strategic approach to the market and thereby ensure a cohesive engagement process with potential Suppliers/Contractors.

Application

Responsibilities

All staff possessing the authority to initiate the formation of a User Group (please refer to Standing Orders and Financial Regulations for guidance) have a responsibility to:

Familiarise themselves with this policy and all accompanying guidelines, and to follow and adopt the principles contained herein.

Understand the importance of participating in the Pre-Tender stage of a category review and undertake their role, and associated responsibilities, with due diligence and commitment.

Individuals delegating the responsibility or nominating a representative to attend the User Group must ensure that the member of staff is aware of their responsibilities.

Draw to the attention of their line manager or member of the Procurement Team any instances of apparent disregard for the principles of this policy. The Group Directors are individually and corporately responsible for ensuring policy implementation in their service areas.

Training

Training will primarily be focused on the Procurement Team with 'Trainee to Trainer' transference of knowledge and skills as this approach will ensure consistency in terminology, focus and approach throughout the Group. Any other individual requests for pre-Tender process training will be assessed on a case by case basis.

Possible areas for training may include:

- Understanding the Group's policy
- Adopting the new Procurement Procedures
- Conveying your Opinions in a Group
- Collating Data
- Preparing Reports

Monitoring and Implementation

In order to assess the success of this policy monitoring systems will be established and the following steps will be taken:

- All of the Group's Procurement Policies and Procedures will be regularly reviewed to ensure that they reflect best practice and serve the changing needs of the Business.
- The Group will establish mechanisms to regularly monitor that all procedures are implemented for each category review undertaken.
- Standardised Contract information will be developed and maintained to strengthen the buying power of the Group for future reviews and to ensure that data contained within any communication is accurate and up to date.
- The Strategic Review document along with minutes of the User Group meetings and feedback into the Procurement Action Group will ensure that all Key Stakeholders have been consulted and are in agreement with the outcome.

Associated Documents

- Defining the Need Procedure & Guidance Notes
- Forming the User Group Procedure & Guidance Notes
- Performing a Market Evaluation Procedure & Guidance Notes
- Formulating the Strategy Procedure & Guidance Notes

- Standing Orders
- Financial Regulations
- Strategic Review Document & Guidance Notes
- OJEU Standardised Timetable
- Localised Purchasing Procedure

Associated Resources

- Procurement Reference Catalogue
- Electronic Contract Database
- Management Accounts (Orchard, SUN)