Selsey Community Forum
Procurement Policy

Policy Statement

Procurement means the way that Selsey Community Forum buys the services, goods and equipment needed to support the work of the Charity and includes appointment of non-staff personnel, such as consultants and contractors. The process of procurement includes planning, sourcing, supplier selection, contracting, supplier relationship, contract performance management, risk assessment and mitigation, and payment. At all stages, the Charity is committed to achieving efficiency, economy and effectiveness through fair and transparent procurement, using procedures that are competitive and auditable and meet the relevant legislation (The Procurement Act 2023 and The Procurement Regulations 2024). In ensuring compliance with legislation, the Charity will avoid any legal challenges or allegations of bribery, corruption and collusion, will achieve value for money and will provide the best possible service to the community.

General

The Policy ensures that all expenditure is properly authorised and provides a standardised procedure for dealing with expenditure items. The core principles in procuring goods and services will be:

- **Value for money** - subject to the financial thresholds set out below, the Charity will seek to procure goods and services that represent the most economically advantageous supply.
- **Avoidance of conflicts** - the Procurement Policy is designed to avoid conflict of interest at all stages of the procurement process in compliance with the Charity's other Policies and to minimise risk to the Charity and its beneficiaries.
- **Fairness** – the Charity will procure goods and services through an open competitive process that is fair and non-discriminatory.
- **Transparency** – the Charity aims to be wholly transparent throughout the procurement process. Where, in exceptional circumstances, the Charity does not follow an open competitive process, a record of the justification for so doing will be kept.
- **Objectivity** – the Charity will apply objective criteria to the evaluation of all quotes and proposals, the criteria having been determined, and communicated, in advance.
- **Accountability** – the Charity will retain sufficient and appropriate records as evidence of the process followed for each procurement exercise, the evaluation of competitive quotes, and the rationale for the decisions made.
- **Sustainability** – the Charity is mindful in procuring services and goods from others of the environmental and social impacts of the work it does and the resources consumed.
- **Compliance** – the implementation of the Procurement Policy is through processes that are drawn from best practice and legislative requirements; that meet the specific requirements of relevant donors and funders; that are proportionate for the financial threshold and nature of the services or goods being procured.

Procurement Processes

Up to £1,000	More than £1,000 and up to	More than £3,000 and up to £50,000	Over £50,000
↓	↓	↓	↓
No quote required – seek value for money	3 estimates required	3 written quotations required	Tender required

i. Purchases estimated to cost up to £1,000 value for money must be sought.

ii. Purchases estimated to cost between £1,000 and £3,000, 3 estimates will be obtained. This can include evidence of online prices, or recent prices from regular suppliers.

iii. Purchases estimated to cost between £3,000 and £50,000 will normally follow a competitive procedure based on 3 invited proposals from a list of qualified firms. The selection process for suppliers will involve the following steps:
- defining the scope, objectives and estimated budget, timescales, including anticipated follow-on services and determining the selection procedure to be followed
- identifying suppliers that are qualified to deliver the required services and preparing a short list of qualified firms
- inviting proposals from the short-list
- evaluating and comparing capabilities and proposals and selecting the preferred supplier
- negotiating a contract with the selected supplier
- managing the process properly

iv. Short lists shall normally include no less than three and no more than six qualified and experienced firms. Ideally the list shall comprise as many qualified companies as possible from the local area.

v. Purchases estimated to cost over £50,000 will be subject to a tender process as follows:
- any invitation to tender shall state the general nature of the intended contract and include the necessary technical specification
- the invitation shall state that tenders must be addressed to the Chair in the ordinary course of post
- where a postal process is used, each tendering firm shall be supplied with a specifically marked envelope in which the tender is to be sealed and remain sealed until the prescribed date for opening tenders for that contract. All sealed tenders shall be opened at the same time on the prescribed date by the Chair in the presence of at least one other Trustee
- where no tender, quote or estimate is accepted, the work is not allocated and the Charity requires further pricing, no person shall be permitted to submit a later tender, estimate or quote who was present when the original decision-making process was undertaken.

vi. Contracts must not be split to avoid compliance with these rules.

vii. All details of pricing and award justification should be retained for audit purposes.

viii. In cases of serious risk to the delivery of Charity services or to public safety, the Chair together with at least one other Trustee may authorise expenditure of up to £10,000 on repair, replacement or other work that in their judgement is necessary.

ix. The requirement to obtain competitive prices need not apply to contracts that relate to:
- repairs to, or parts for, existing machinery or equipment;
- works, goods or services that constitute an extension of an existing contract;
- goods or services that are only available from one supplier or are sold at a fixed price.

Preferred Suppliers

Where a strategic or operational need to establish a longer-term relationship with a supplier for the delivery of services or goods is identified, a preferred supplier relationship might be established. The preferred supplier contract will have a validity period of four years, after which time the competitive process would be repeated to provide ongoing assurance of value for money. The main reason in establishing preferred supplier relationships is one of intentionality so that the relationship can be developed. The preferred supplier contract may result in fee rates being agreed in advance and may allow for future negotiation for each assignment given to the supplier under the agreed contract. This will be determined as part of the original procurement process.

Evaluation and Selection

When a quotation is requested from a list of suppliers, the invitation must clearly state the criteria for evaluating them.

The evaluation of consultants should normally be based only on technical considerations including, but not limited to, experience in similar assignments, local experience and presence, qualifications of key personnel proposed for the assignment, and suitability and quality of the work plan.

For some assignments of a straightforward technical nature, the price of the services must be a consideration, but quality and value for money should remain the principal factor in selection. In some circumstances it may be necessary or advantageous to engage or continue with a specific consultant where:

- the consultant has unique expertise or experience; or
- the consultant has been or is involved in the early phases of the project such as feasibility or design, and it has been determined that continuity is necessary and no advantage would be gained from following competitive procedures; or
- additional services not included in the original contract have, through unforeseen circumstances, become necessary for the performance of the contracted services, on condition that those additional services cannot be technically or economically separated from the original contract without major inconvenience to the contracting authorities or when such services, although separable from the performance of the original contract, are strictly necessary for its completion.

Governance and Organisational Capability

In the planning and development of major (capital) projects, it will be necessary to review the Charity's capacity skills and experience in procurement and will need to assess the strengths and weaknesses of the Board of Trustees, as well as of staff and volunteers. It may be necessary to set up a dedicated procurement group to take collective responsibility for overseeing the procurement and monitoring its progress and to take into consideration the following:

- being clear about the roles and skills required to oversee a complicated procurement
- being confident these skills are evident on the group
- establishing a process for ensures this

Other Matters

This Policy is applicable to all the activities in which Selsey Community Forum is or becomes involved; it is to be reviewed and updated as necessary at least annually.

Review

This Policy will be reviewed periodically and may be amended to reflect changes in legislation, guidance, organisational requirements or best practice.

Version Control

Version Number	Date of Update	Amendments
1.0	October 2025	Policy reviewed
2.0	October 2026	Reviewed and updated in line with current guidance