



**Craigdale**  
HOUSING ASSOCIATION

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## PROCUREMENT POLICY

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**Date of Approval: 29.06.2026**

**Date of Next Review: 2029**

**Craigdale Housing Association can provide this document on request, in different languages and formats, including Braille and audio formats.**

## **1.0 Introduction**

- 1.1 Craigdale Housing Association (Craigdale) seeks to procure services in a manner that not only complies with current legislation and best practice but also works creatively and collaboratively to support the local economy in Castlemilk and the wider area.
- 1.2 This Policy describes how Craigdale will purchase, or 'procure', goods and services.
- 1.3 The term 'procurement' as used in this policy covers the process of purchasing the full range of goods and services we require, ranging from small items purchased from the petty cash float to large development and planned maintenance contracts awarded following a compliant procurement process.

## **2.0 Purpose**

- 2.1 This Policy establishes how Craigdale's Board expects procurement related activity to be undertaken by the organisation.

## **3.0 Policy Objectives**

- 3.1 The objectives of this policy are to ensure that Craigdale:
  - Complies with current procurement legislation and best practice
  - Is able to demonstrate that value for money has been achieved, both in the commissioning of individual contracts, and as an organisation as a whole;
  - To ensure that all suppliers appointed by us are sufficiently competent, have sufficient resources and are committed to improving the service provided to our tenants and customers;
  - Are committed to protecting the health and safety of our employees, tenants, customers and members of the public,
  - Are committed to promoting innovation in the delivery of services to our tenants and customers;
  - Are committed to improving equalities, and the economic prosperity of the community in which we work; and
  - Ensure equal treatment of all suppliers, confidentiality of all information received from them, and transparency and proportionality for all aspects of the procurement process.

## **4.0 Legislation and Regulatory Framework**

- 4.1 This Policy supports the Association in meeting its statutory obligations under the Procurement Reform (Scotland) Act 2014 (Note - Craigdale is deemed to be a 'public contracting authority' and is therefore bound by the requirements of this legislation); the Public Contracts (Scotland) Regulations 2015; the Procurement (Scotland) Regulations 2016; UK Government Find a Tender Service (FTS); the Scottish Procurement Policy Handbook and the Bribery Act 2010, all as amended from time to time, and any other relevant legislation as enacted by the relevant legislature.
- 4.2 This Policy supports the Association in meeting particular aspects of the Scottish Housing Regulator's Regulatory Standards of Governance and Financial Management.

**Standard**

**Guidance**

**The RSL manages its resources to ensure its financial well-being and economic effectiveness**

The RSL has effective financial and treasury management controls and procedures, to achieve the right balance between costs and outcomes. The RSL ensures security of assets, the proper use of public and private funds, and access to sufficient liquidity always. (Guidance 3.1)

**The governing body bases its decisions on good quality information and advice and identifies and mitigates risks to the organisation's purpose**

The governing body identifies risks that might prevent it from achieving the RSL's purpose and has effective strategies and systems for risk management and mitigation, internal control and audit. (Guidance 4.3)

4.3 This Policy also supports the Association in meeting certain outcomes and standards contained within the Scottish Social Housing Charter (April 2017).

**Standard**

**Outcome**

**Communication:** Social landlords manage their businesses so that:

- tenants and other customers find it easy to communicate with their landlord and get the information they need about their landlord, how and why it makes decisions and the services it provides.

This outcome covers all aspects of landlords' communication with tenants and other customers. This could include making use of new technologies such as web-based tenancy management systems and smart-phone applications. It is not just about how clearly and effectively a landlord gives information to those who want it. It also covers making it easy for tenants and other customers to make complaints and provide feedback on services, using that information to improve services and performance, and letting people know what they have done in response to complaints and feedback. It does not require landlords to provide legally protected, personal or commercial information.

**Value for Money:** Social landlords manage all aspects of their businesses so that:

- tenants, owners and other customers receive services that provide continually improving value for the rent and other charges they pay.

These outcomes reflect a landlord's legal duty to consult tenants about rent setting; the importance of taking account of what current and prospective tenants and other customers are likely to be able to afford; and the importance that many tenants place on being able to find out how their money is spent. For local councils, this includes meeting the Scottish Government's guidance on housing revenue accounts. Each landlord must decide, in discussion with tenants and other customers, whether to publish information about expenditure above a particular level, and in what form and detail. What matters is that discussions take place and the decisions made reflect the views of tenants and other customers.

## 5.0 Bribery Act 2010 & Code of Conduct

- 5.1 Craigdale acknowledges the provisions of the Bribery Act 2010 and aims to maintain compliance with this as part of its everyday business. This is particularly relevant when procuring works and services. Reference should be made to our separate Policy on Bribery, Fraud & Corruption.
- 5.2 Craigdale will always carry out its business transparently and fairly and will operate a zero-tolerance policy towards bribery by its employees, Board members, contractors, agents and other associated persons.
- 5.3 Craigdale's Board members and staff sign a Code of Conduct, and this must be complied with at all times. The Code makes specific reference to connected people and declarations of interest.

## 6.0 Procurement activities

- 6.1 The main goods and services that will require to be procured by the Association are as follows, but not limited to:
  - Small items of office supplies or other consumable products
  - All office printing, stationery, postage and other materials
  - Trade materials used by the Handyperson/Estate Caretaker
  - Office furniture and equipment
  - ICT equipment and 'back-up' services
  - Maintenance contracts related to office-based equipment or services, e.g. ICT equipment, photocopier, fire and security alarm systems
  - Professional services including internal auditors, external auditors, solicitors, bankers, insurance brokers, finance consultants, architects, surveyors, principal designers, engineers, and development consultants and clerk of works employed on specific projects
  - Office cleaning
  - Contractors covering the full range of trades and professions
  - Cyclical and planned maintenance works
  - New build construction works

## 7.0 Value for Money

- 7.1 In all our procurement activities we will aim to achieve ~~the~~ best 'value for money' in a sustainable manner by ensuring that, whenever appropriate, we assess quality, cost and sustainability. We recognise that the lowest cost will not necessarily be the best value in the longer term, particularly when the contract being procured has a high degree of service delivery to our tenants.
- 7.2 We recognise the importance of sustainable procurement, and our duty to demonstrate that we are procuring in a manner that improves the economic, social and environmental wellbeing (this includes reduction of inequality) of the communities in which we operate.

- 7.3 Sustainable procurement should be balanced with value for money and quality and needs to be proportionate to the risk involved in each individual procurement.
- 7.4 The specific procurement approach adopted will be based on the nature, scale and value of the contract being awarded. For higher value contracts, i.e. contracts more than £30,000, a report will be presented to the Board outlining the procurement options by the officer responsible for overseeing the project at inception. In this way, the Board will determine the compliant procurement route to be followed by taking account of legislation and this policy.
- 7.5 Where it is appropriate or mandatory to consider tenders on a basis other than purely price, a scoring matrix will be developed. The factors scored will vary depending on the nature of the goods or service being procured, with the weighing of the different factors considered and determined in advance. To ensure transparency, the scoring criteria will be provided to all companies as part of the tender packs being issued. The Board will agree the appropriate weighting prior to any tenders being released considering the nature, scale, and value of the contract such as 60% quality, 40% price and so on.
- 7.6 In making procurement decisions we will also seek to contribute to maintaining and improving the environment, both by purchasing recycled or 'environmentally friendly' fair and ethically traded goods and items whenever possible and/or by supporting suppliers or contractors whose values and production processes are environmentally positive.

## **8.0 Financial Limits**

- 8.1 The Board will review these financial limits at least every 3 years to ensure that they remain appropriate for effective governance
- 8.2 When procuring contracts for goods, services or works, deemed to be regulated contracts, Craigdale will comply with the Public Contracts (Scotland) Regulations 2015 ('the Regulations'), the Procurement Reform (Scotland) Act 2014 ('the Act'), Procurement (Scotland) Regulations 2016, all as amended from time to time, and any other relevant legislation as enacted by the relevant legislature. The procedure for the award of any regulated contract will depend upon the estimated value of that contract and if VAT applies, and the applicable rate of VAT.
- 8.3 Regulated contracts subject to the Public Contracts (Scotland) Regulations 2015 will take account of current thresholds approved by Scottish Ministers. Current thresholds as of 1 January 2026 are expected to remain in force until 31 December 2027 unless altered before then as follows:
- £5,193,000 for work contracts, inclusive of VAT
  - £207,720 for supplies and services contracts, inclusive of VAT

- 8.4 Regulated contracts subject to the Procurement Reform (Scotland) Act 2014 will take

account of current thresholds as follows:

- £2,000,000 for work contracts, exclusive of VAT
- £50,000 for goods and services contracts, exclusive of VAT

The prescribed threshold values set out above will be automatically revised in accordance with any subsequent amendment to the threshold values set by the Scottish Government for supply, services, or works contracts.

8.5 The procurement methods to be used below these thresholds are detailed in the next section; section 9.

## **9.0 Obtaining prices, quotations and tenders**

9.1 Appendix 2 outlines the procedures that will be followed in relation to both regulated and unregulated contracts, considering the financial regulations with respect to the latter.

9.2 Approval to enter a contract can only be granted by the Board for contracts with a value of more than £30,000 excluding VAT, following the production of a Tender Report at the first available meeting. If there are time constraints, the Board may consider delegating authority to the Chief Executive Officer in consultation with the Chairperson to approve contracts up to a pre-approved level with a retrospective report presented to the Board at the next available meeting, subject to a satisfactory audit trail being in place.

9.3 Where it is proposed that contracts are procured through negotiation, there must be clear justification for doing so and the decision to enter contracts based on negotiation must be approved at the appropriate level of authority prior to the procurement process beginning.

9.4 Prior to contract award, a variety of due diligence checks will be conducted in relation to the proposed supplier, including a review of accounts over the last 3 financial years, where appropriate Dun & Bradstreet (or equivalent) checks, two satisfactory references from other RSLs to determine the competence of the supplier, receipt of satisfactory insurances and a review of relevant policies. The extent of the due diligence will be reflective of the service/work to be provided by the supplier.

### **Prices**

For items under the current cost limit which do not require quotations or tenders i.e. £5,000, excluding VAT, the authorised member of staff will adhere to Appendix 1.

9.5 Quotations may be requested either verbally or in writing. In either case, the authorised member of staff (as per Appendix 1) will ensure that sufficient detail is provided to those invited to quote to enable accurate, comparable quotes to be received. The staff will maintain an audit trail.

### **Tenders**

9.6 Following the development of the appropriate tender documentation, suppliers will be invited to tender taking account of the tendering procedures outlined within Appendices 1 and 2.

- 9.7 Reports on tenders and recommendations will be presented to the Board for approval prior to contracts being awarded.

9.9As outlined above some goods and services may be procured on a basis other than pure price e.g. price and quality-‘Regulated contracts’ i.e. those that fall within the scope of the FTS procurement regulations specifically cannot be awarded purely based on price alone. The Most Economically Advantageous Tender (MEAT’) must be the basis for any award unless an award is made as a call-off from an existing framework-

It is important for an organisation to evaluate the security standards of their suppliers and in some cases validate relevant cyber security credentials. Where Craigdale will be sharing data electronically with suppliers, the suppliers will be asked through the form of tender (as a minimum) that they hold Cyber Essentials accreditation or equivalent.

## **Negotiation**

9.8 Where it is proposed that contracts are procured through negotiation, there must be clear justification for doing so and the decision to enter contracts based on negotiation must be approved at the appropriate level of authority

## **10.0 Framework Agreements**

**10.1** Rather than conducting a stand-alone procurement procedure in respect of a particular requirement, Craigdale may consider procurement through a Framework Agreement.

**10.2** What is a Framework Agreement? - An ‘umbrella agreement’ that sets out the terms (particularly relating to price, quality, and quantity) under which individual contracts (“call-offs”) can be made throughout the period of the Agreement (which will be a maximum of 4 years). Framework Agreements can be set up for one contracting authority to use or can be set up for several contracting authorities to use. Craigdale may determine that it would be in the best interests of the tenants and the Association to access existing frameworks, such as, Scotland Excel (SXL), the Scottish Procurement Alliance (SPA), PfH (Procurement for Housing), Buying Solutions, Hub West, Wheatley Group, Link Group (C-urb), and possibly other Framework Agreements set up by other RSLs. Framework Agreements are either concluded with a single supplier or with multiple suppliers. Often, Framework Agreements are split into lots taking account of the nature and scale of the contract. Subject to how the framework was established, call-offs can be because of a direct award or by running a mini-competition. In the event of calling-off from an existing framework, contract documents will confirm that any terms not specifically defined within the contract documents will have the meaning ascribed by the conditions of contract as set by the framework provider to ensure full compliance with the Regulations and Act. Further, it is understood that by utilising an existing framework, this can offer potential benefits relating to economies of scale and can also be less resource intensive and therefore an efficient way to procure compliantly.

10.3 The decision to utilise an existing framework will be following a report by the lead officer outlining the benefits of utilising a particular framework, including a recommendation on whether the call-off should be a direct award or because of running a mini competition for all contracts more than £30,000 per Appendix 1.

10.4 Membership of suitable frameworks will be reviewed annually and where it is considered in the best interests of Craigdale to become a member of a new framework provider, this will be discussed and approved by the Board prior to membership being sought.

## **11. Contracts and Service agreements**

**11.1** Craigdale will procure certain services through contracts, framework/partnering agreements or service agreements for periods of one year or longer, where appropriate. Examples are contracts for the provision of reactive maintenance, servicing of office equipment, fire and security alarms, framework/partnering agreements for planned maintenance works. Threshold levels for the life of the contract per Appendix 1 will apply.

11.2 The results of tendering exercises for service contracts or agreements will be reported to the next meeting of the Board for approval prior to contracts awarded.

## **12. Specialist Suppliers or contractors**

Where there is only one specialist supplier or contractor for a particular item or service, we will seek to negotiate the most advantageous price and terms prior to placing an order or signing an agreement. Details of the discussions held and the reasons for the final recommendation will be fully recorded and reported to the Board for approval should financial limits dictate that Board approval is required, all in accordance with procurement legislation.

### 13. Other methods of procurement

13.1 We will continually review our methods of procurement to achieve best value for money, meet our duty of sustainable procurement and to comply with current statutory regulations, Scottish Housing Regulator guidance and 'best practice'.

We will seek to develop mutually beneficial customer/supplier relationships, particularly with those local contractors and suppliers with which we wish to develop medium- to long-term arrangements for the benefit of Craigdale Housing Association, all in accordance with procurement legislation.

### 14. Exceptions

14.1 There are certain exceptional circumstances in which competitive tenders are not required for the award of contracts for supplies, services, or works which are above the applicable threshold values, i.e., regulated contracts under the Regulations or the Act, including the 5 legal grounds as follows:

- absence of tenders ground where none or no suitable tenders have been received
- artistic reasons ground;
- technical reasons ground, including where additional services or works are required which could not have been anticipated prior to the initial contract commencing
- ground exclusive rights, such as a contractor or developer having ownership or control over land in terms of future development
- extreme urgency ground brought about by events unforeseeable to Craigdale

14.2 Regarding unregulated contracts, the policy may be reconsidered on a one-off basis, such as i) Consultants are being used and there is a sound business reason to offer a particular firm the work. For example, if they have unique skills; have carried out work 'at risk'; the work is of a confidential business nature and professional advice is required more quickly than following the procedures would allow ii) If works have been included as part of a schedule of rates contract which has been tendered in the usual way and the cost of the repairs does not exceed £20,000. In such circumstances, Board approval must always be sought before contracts are entered into.

### 15.0 Fair Work Practices

**Craigdale, as a public sector organisation and grant recipient adopts fair employment practices and already offers the core criteria required by Scottish Government's Fair Work First Policy. When procuring services, supplies and works, Craigdale will monitor suppliers' practices in relation to the FWF Policy to help address labor market inequalities**

**16.0 Community Benefits**

The Act requires that, for any regulated procurement with an estimated value equal to or greater than £4,000,000 (excluding VAT), Craigdale must consider whether to impose community benefit requirements as part of the contract delivery before conducting the procurement which is proportionate to the value of the contract.

Community Benefits clauses laid down by framework providers will form part of the contract documents where applicable.

The Board will develop a 'wish list' prior to entering a contract with a supplier. Craigdale will endeavour to agree the Community Benefits to be received from the supplier prior to formal contract award and will monitor the benefits as one of the KPIs forming part of the tender documentation.

17.0

**Payment of contractors**

The Association will ensure not only timely payment (within 30 days or payment within terms) to suppliers but will also make it a contractual requirement that main contractors who sub-contract any elements of their work also provide evidence of timely payment to their sub-contractors. Payments within terms will be reviewed as part of our Annual Procurement Reports. 18.0 Repeat and Extended Contracts Craigdale is conscious of the time and cost that is involved in the procurement process, both from the Association's point of view and that of prospective tenderers. As a result, it seeks where feasible and within the boundaries of current procurement legislation and -best practice, to develop a partnership approach with contractors and consultants. In this respect, successful completion of specific pieces of work may lead to the offer of further negotiated packages of work in the coming years taking account of procurement legislation. The possibility, and maximum duration, of any such extension should be indicated in the original procurement process.

In general, contract extensions should only be proposed where the cost uplift is at or below sector inflation rates.19.0

**14.0 Contracts Register**

**19.1** Craigdale will maintain a Contracts Register, updating it after each new contract award and publish this on the website.

**19.2** Procurement processes, including unregulated contracts, will be administered via the PCS Post-box as noted within Appendix 1. When contract awards are made, the Contract Award will also be published on PCS.

20.0

**15.0 Procurement Strategy & Annual Report****20.1**

The Procurement Reform (Scotland) Act 2014 requires any public organisation which has an estimated annual regulated spend of £5 million or more (excluding VAT) to develop and review a Procurement Strategy annually before the start of that next financial year. This requirement also applies to an organisation that becomes aware of having this level of spending during the year. Whilst our anticipated annual regulated spend during 2026/27 is expected to be below this level, in terms of best practice and in the interests of transparency, Craigdale has chosen to prepare a Procurement Strategy with the first Strategy forwarded to Scottish Ministers in March 2026.

20.2

**15.1** Craigdale will also produce Annual Procurement Reports within the first 6 months of each new financial year relating to spend in terms of both regulated and unregulated contracts in the previous reporting period. These reports will also include our anticipated value of contracts during the next two reporting periods.

**20.3** Our Annual Procurement Reports will consider as a minimum the level of awards for SMEs, community benefits received because of contract awards and Craigdale's performance in relation to payment within terms.

**20.4** In the spirit of openness and accountability, we will include a summary of our procurement activity within our Annual Report, which is issued to our tenants and other stakeholders.

21.0

**16.0 Monitoring and review**

**21.1**

16.1 The Chief Executive Officer is responsible for ensuring that this Policy, and the policies and procedures which support it, are followed by all Board Members and members of staff involved in the procurement process.

21.2

16.2 The Chief Executive Officer is responsible for ensuring that staff and consultants where applicable will implement this Policy and the relevant procedures, when procuring goods and services and will arrange appropriate procurement training in this respect.

21.3

This Policy must be interpreted in accordance with fundamental general principles of equal treatment, non-discrimination, transparency, and proportionality.

21.4

This policy may only be suspended either in whole or in part by a decision of the Board in respect of the proposed award of any contract upon the joint recommendation of the Chairperson and Chief Executive Officer provided there are special circumstances justifying the suspension, and subject to any suspension remaining compliant with legal requirements.

16.4 This policy will be reviewed by the Board at least every 3 years.

22.0

**17.0 Complaints**

17.1 Reference should be made to the Association's Complaints Policy.

23.0

**18.0 Equal Opportunities**

18.1 The Association is committed to ensuring equal opportunities and fair treatment for all. In implementing this policy, our commitment to equal opportunities and fairness will apply irrespective of factors such as gender or marital status, race, religion, colour, disability, age, sexual orientation, language or social origin, or other personal attributes.

24.0

**19.0 Data Collection**

Craigdale will manage all personal data as a result of contract awards in accordance with our obligations under the GDPR Regulations and the Association's Policy.

**Appendix 1 Procurement Summary (amendment approved by Board 22.06.26)**

Procurement Responsibility	Value (excluding VAT) unless otherwise stated	Primary Procurement Methods	Secondary Procurement Methods
<ul style="list-style-type: none"> <li>Housing/ Maintenance Officer</li> <li>Senior Housing Officer</li> </ul>	<p>Up to £5,000</p> <p>Up to £10,000</p>	<p>Suppliers' schedule of rates/price list</p> <p>Suppliers' schedule of rates/price list</p>	<p>3 written quotes from approved or relevant suppliers if not part of Schedule of Rates or call off from framework</p>
<ul style="list-style-type: none"> <li>Corporate Manager</li> </ul>	Up to £20,000	Suppliers' schedule of rates/price list	3 quotes from approved or relevant suppliers if not part of Schedule of Rates or call off from framework
<ul style="list-style-type: none"> <li>Chief Executive Officer</li> </ul>	Up to £30,000	3 quotes from approved/specialist suppliers administered via PCS Quick Quote facility or call off from framework	
<ul style="list-style-type: none"> <li>The Board</li> </ul>	£30,001-£50,000	4 tenders from approved/specialist suppliers administered via PCS Quick Quote facility or call off from framework	
<ul style="list-style-type: none"> <li>The Board</li> </ul>	>£50,000 for supplies and services and >£2,000,000 for works (& under FTS limits)	Tender via Public Contracts Scotland or call-off from existing framework in line with Appendix 2	NA
<ul style="list-style-type: none"> <li>The Board</li> </ul>	Supplies/Services >£207,720, inclusive of VAT	Tender via FTS & Public Contracts Scotland or call-off from existing framework in line with Appendix 2	NA
<ul style="list-style-type: none"> <li>The Board</li> </ul>	Works >£ 5,193,000, inclusive of VAT	Tender via FTS & Public Contracts Scotland or call-off from existing framework in line with Appendix 2	NA