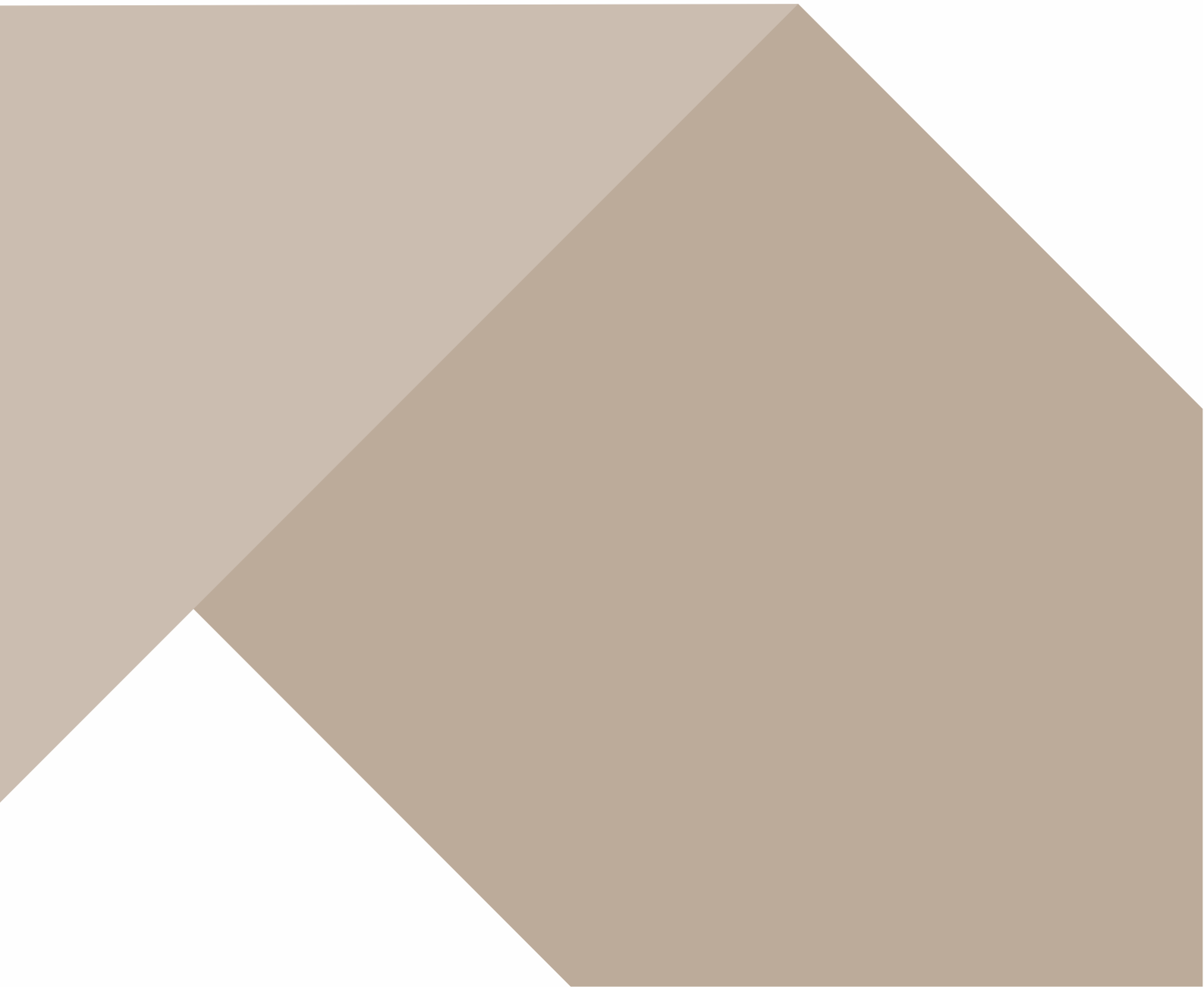


Group Procurement Strategy

January 2024



Preamble

We can produce information on request in large print, Braille, tape and on disk. It is also available in other languages. If you need information in any of these formats please contact us on Freephone 0800 479 7979.

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چنانچه مایل باشید می‌توانید این مطالب را به فارسی یا زبان‌های دیگر و همچنین بریل و یا بر روی نوار کاست دریافت دارید. در صورت نیاز خواهشمندیم با شماره تلفن 0800 479 7979 با ما تماس بگیرید.

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Approval body	<i>Wheatley Solutions Board</i>
Date of approval	<i>February 2024</i>
Review Year	<i>January 2025</i>
Customer engagement required	<i>No</i>
Trade union engagement required	<i>No</i>
Equality Impact Assessment	<i>No</i>

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1. Introduction

Introduction to Wheatley Group

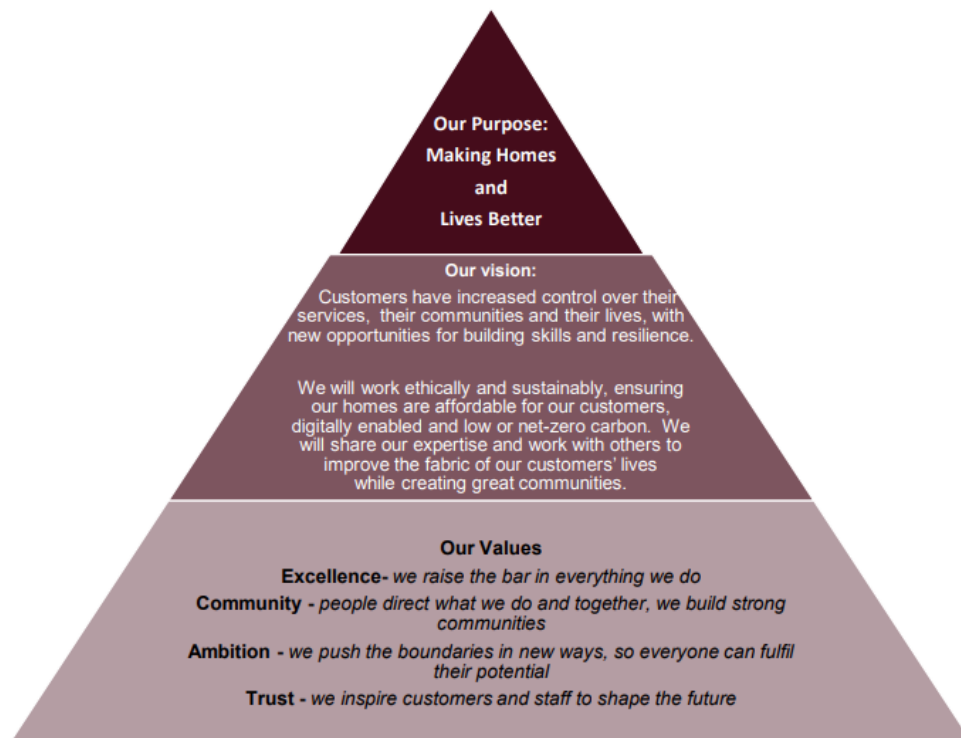
Wheatley Group (Wheatley, the Group) is one of the UK's most dynamic, agile and best-performing housing, care and property-management groups.

Owning or managing over 93,700 homes, Wheatley is Scotland's largest and the UK's 4th largest housing group and delivers award-winning services to over 210,000 people across 19 local authorities in Scotland.

Wheatley employs 2,700 people directly and a further 2,000 as joint owners of one of Scotland's largest repairs and maintenance companies, City Building (Glasgow). Over the past decade Wheatley's Registered Social Landlords (RSLs) have created more than 11,000 jobs and 2,000 training places as they seek, with partners, to break the cycle of poverty and exclusion that many of its customers still experience.

The Group now has strategic agreements in place or being developed in six key areas of operation (Glasgow, Edinburgh, Dumfries and Galloway, West Lothian, East Lothian, and West Dunbartonshire) and operates within 19 Local Authority areas across central and South-West Scotland.

Purpose, Vision and Values



Group Structure

Wheatley Housing Group ('The Group') is Scotland's leading housing, care and property management group. We are an organisation which currently comprises of four Registered Social Landlords, a Care Partner, a Charitable Foundation a Repairs Division and commercial subsidiaries.

The Group currently spans 19 Local Authority areas across Scotland.

Our Group partners are:

- Wheatley Homes Glasgow
- Wheatley Homes South
- Wheatley Homes East
- Loretto Housing Association
- Lowther Homes
- Wheatley Care
- Wheatley Solutions
- Wheatley Foundation
- *City Building (Glasgow)

*We refer to the 50/50 Joint Venture with Glasgow City Council, City Building (Glasgow), as a Partner Organisation, although City Building (Glasgow) have their own governance procedures and undertake their own procurement processes for the supply of all goods and services.

Wheatley subsidiaries are proud to retain their own identity but are united by a common commitment to excellence in all they do. They have a joint purpose in 'Making Homes and Lives Better' for the people they work for and the communities in which they live. This shared culture across our maturing Group ensures Board Members and staff are increasingly comfortable applying principles and platforms appropriately with respect to their different customer groups and contexts, to deliver exceptional customer experience.

2. Public Procurement and Core Principles

Public procurement is based on four basic principles:

- **Transparency** – the reasons for procurement decisions must be clear to all.
- **Accountability** – The Group is required to be accountable to our Board, stakeholders, and customers for all decisions that we make when spending money. This principle requires that decision making can be audited to ensure consistency with other principles and that any potential conflicts of interest are avoided.
- **Fairness, Equal Treatment and Non-Discrimination** – All parties involved in procurement decisions must be treated fairly, with no potential supplier being treated either more or less favourably than any other potential suppliers. This also means that contract opportunities must be advertised widely enough to ensure that genuine competition between suppliers is possible.
- **Proportionality** – The requirements made of potential suppliers must be made on a scale which is consistent with the type and size of the contract opportunity.

Our Procurement Vision

- To deliver commercially effective, transparent, compliant procurement processes across the Group and delivering value for money and Best Value to our customers and Stakeholders.
- To be recognised as having leading commercial, procurement and commissioning practices and skills delivering outstanding outcomes.
- To provide key input towards the Group Strategy.

Our Strategic Aims and Objectives

Our Procurement Strategy aim is to assist the Wheatley Group to achieve business objectives and to contribute to the achievement of the aims and objectives of our partner organisations.

Deliver savings, value for money and Best Value and we will achieve these by:

- Working together to identify opportunities and continuing to challenge the status quo;
- Ensuring that all opportunities are thoroughly considered and all implications of change in delivery is fully appraised;
- Increasing our collaboration with other organisations; and
- Developing a coordinated pipeline of future procurement projects to improve our services.

Change supplier and internal behaviours, improve processes and policies by:

- Creating Procurement categories to provide support and promote market knowledge and information sharing to oversee implementation of this Strategy;
- Creating Procurement User Intelligence Groups (UIG's) to engage with all partner organisations to oversee implementation of this Strategy;
- Introducing and refining regular reporting of procurement performance and compliance;
- Improving contract and supplier relationship management across the Group to ensure that we are getting the most value and innovation from our contractual relationships;
- Reviewing and improving our Purchase to Pay ('P2P') processes to strengthen controls, increase efficiency and provide useful and up-to-date management information;
- Ensuring that there are standard templates in place for all procurement and contracting documentation and ensure that these are regularly reviewed in line with legislation and best practice; and
- Embedding sustainable procurement as business as usual and incorporating community benefits in all appropriate contracts. Supporting local businesses and SMEs through closer working with stakeholders making our processes more streamlined and accessible.

Increase expertise, capacity and effectiveness and we will do this by:

- Developing staff within the Group Procurement Department through training, secondments, and mentoring programmes; and
- Developing and embedding contract and supplier management practices and improving commercial awareness across the Group.

Compliance with Procurement Legislation

The Scottish Government continues to promote a national programme of public sector procurement reform to drive continual improvement in procurement practice and we endorse and support that position. The Strategy recognises that the Wheatley Group and its subsidiaries, as a contracting authority, are subject to the application of the legislative requirements which bind public procurement practice in Scotland namely:

- The Procurement Reform (Scotland) Act 2014
- Public Contracts (Scotland) Regulations 2015
- Procurement (Scotland) Regulations 2016
- Concession Contract (Scotland) Regulations 2016

It is further acknowledged that all procurement activity must conform to the processes and governance detailed in the Group's Standing Orders, Procurement Policy and Procurement Manual.

Public Contracts (Scotland) Regulations 2015 Thresholds

PCSR 2015	From 1 January 2024 (inclusive of VAT)
Works	£5,372,609
Concessions – Works and Services	£5,372,609
Services and Supplies (non Schedule 1 Entities)	£214,904
Light Touch Regime	£663,540
Small Lots (works)	£884,720
Small Lots (supplies and services)	£70,778

Procurement Reform (Scotland) Act 2014 Thresholds

Works	£2,000,000
Services and Supplies	£50,000

As a business, we require to be able to respond quickly and proactively to economic, social, legislative, and political factors as they change. We require a dynamic strategy to ensure that there is a clear framework for achieving a continuous programme of improvement and value which is in alignment with our core corporate values and ‘Your Home, Your Community, Your Future’ strategy.

Current legislation introduced additional requirements for contracting authorities to demonstrate transparency and equal treatment of suppliers. In order to increase transparency and treat all suppliers equally and fairly, the Group Procurement Team will continue to undertake all procurement processes over £50,000 in accordance with agreed methodologies and the requirements of the Procurement Reform (Scotland) Act 2014 and the Procurement (Scotland) Regulations 2016, maintaining an audit trail of scoring and rationale throughout the process. The Procurement Team will provide advice to business leaders and budget holders on procurement below £50,000 to support good practice in procurement throughout the Group.

Procurement Routes Based on Spend

Financial Value	Process	No. of Suppliers
Below £25,000	Guidance on WE Connect that must be followed to achieve best value. Quick Quote process via PCS (quality/price) may be followed if the contract is deemed to be of medium risk or higher.	N/A unless Quick Quote is used. if so, 3 – 5 suppliers must be invited to quote.
£25,000-£50,000	Quick Quote process via PCS (quality / price)	3 - 5
£50,000 (Goods and Services) £2m (Works) and above up to PCSR Thresholds	Tender process via PCS – quality / price in accordance with the requirements of the Procurement Reform (Scotland) Act 2014 and the Procurement (Scotland) Regulations 2016	As per specific procurement route. Seek advice.
Above PCSR Thresholds	Tender process in accordance with the requirements of the PCSR	As per specific procurement route in the PCSR. Seek advice.
Beneath £50,000 (Goods and Services) and £2m (Works) where a competitive tender process is not possible	Waiver Approval Form	Single Supplier
Above £50,000 (Goods and Services) and £2m (Works) where a competitive tender process is not possible	Negotiated Procurement without prior publication of a Contract Notice	Single Supplier

3. 2021-2026 Strategy

'Your Home, Your Community, Your Future'

Our vision is to set the benchmark in Scotland and beyond for outstanding customer satisfaction in housing, care and property management, driven by our 'Your Home, Your Community, Your Future' strategy. Our strategic themes and key outcomes are as follows:

Strategic Themes:				
Delivering Exceptional Customer Experience	Making the Most of our Homes and Assets	Changing Lives and Communities	Developing our Shared Capability	Enabling our Ambitions
Key Outcomes:				
Progressing from Excellent to Outstanding	Increasing the supply of new homes	Shaping Care services for the future	W.E. Think – creating our "Thinking Yes Together" culture	Raising the funding to support our ambitions
Enabling customers to lead	Investing in existing homes and environments	Developing peaceful and connected neighbourhoods	W.E. Create – driving innovation	Maintaining a strong credit rating and managing financial risks
Developing a customer led repairs service	Setting the benchmark for sustainability and reducing carbon footprint	Supporting economic resilience in our communities	W.E. Work – strengthening the skills and agility of our staff	Evolving digital platforms to support our activities
Differentiating Lowther from its competitors	Building community voice, engagement and resilience			Influencing locally and nationally to benefit our communities

The five-year strategy for the Group provides direction for long term procurement planning, based on the Group's values – excellence, community, ambition, and trust. In addition to "business as usual" procurement to support Group functions, it enables the Procurement Team to have early discussions with key business owners on the projects which will transform the Group's activities over time and identify the scope and complexity of procurement needs. It also allows the Procurement Team to engage earlier with the market, to identify opportunities to utilise external expertise and leverage spend.

Specifically, the Procurement Team will have an impact in the following areas:

Theme 1: Delivering Exceptional Customer Excellence

Procurement has a key role to play in procuring contracts which are centred around designing digital services to progress the Group's aim to become a digitally led business.

Procurement will also assist the Group to re-design and re-configure our existing services by working with teams to understand our customers' needs. The desired outcomes will be included in our future procurement processes.

Theme 2: Making the most of our Homes and Assets

The Procurement Team will continue to support the Development Team to deliver the challenging target of 4,000 new affordable homes by 2026. Another key strand of work will be to further support the success of the Transformational Regeneration Areas (TRAs) across our communities in Glasgow and Dumfries & Galloway. Our new build procurement framework agreement supports this programme. Awards will be conducted through this framework to deliver the new-build programme across our communities.

On top of the investment in new build property, the Procurement Team will support further investment of £330m in improving, modernising, and maintaining homes.

Procurement will support the Group's "Stronger Voices, Stronger Communities" engagement framework by implementing co-created design input into new development and existing investment projects.

Procurement will advise and support on sustainable considerations that can be built into our contracts to meet our long-term goals to become carbon neutral and to mitigate fuel poverty. Procurement will also ensure that stretching Community Benefits are built into all contracts where clear benefit(s) can be gained by our communities. Progress on the implementation of Community Benefits will be tracked through our new Contract and Supplier Management system.

Theme 3: Changing Lives and Communities

The Procurement Team will continue to support the Group's care services, by maximising the competitiveness and value for money offered by our care services. This support shall include the procurement of assistive technology to our customers who can benefit from using aids and devices to improve their quality of life.

We can support connected neighbourhoods by continuing to work with key technology suppliers to facilitate access for our customers and communities to affordable broadband connections to maximise digital inclusion. Procurement also has a role to

play in sourcing innovative fire prevention products to help reduce the number of accidental dwelling fires.

The Procurement Team can help to support economic resilience in our communities by utilising our collective buying power through our contracting. Where possible, we will seek to pass on the benefit of this through reduced costs to customers' household bills (e.g., Insurance offer).

Theme 4: Developing our Shared Capability

The Procurement Team will support the Group's "Thinking Yes Together" culture by facilitating the investment in technology and digital platforms to create a customer led self-serve experience. Project and Programme delivery will also include extensive partner integration (of services, information and shared outcomes) through delivery of 'As a Service' platforms and shared delivery models of business and technology services. Procurement also has a role to guide staff on any procurement law/contractual implications of different potential delivery options.

Procurement can support W.E Create through market testing to ensure that innovative ideas can become a reality via our supply chains. As part of the Group's new approach to Contract and Supplier Management, innovation will be a key aspect of discussion and action during regular contract reviews.

Theme 5: Enabling our Ambitions

Procurement will work closely with IT and other teams across the Group to deliver improved digital platforms to support our activities ensuring our customers and staff are digitally enabled. This work is pivotal to shape future customer engagement and to assist the Group to improve and evolve core business processes, implement improved service design and operational delivery and ultimately deliver better outcomes for our customers.

The procurement of the ongoing supply of goods and services contracts will be subject to a continuous improvement cycle. By doing this, as a Group we will ensure that we extract the maximum value from our contracts and as a result, reduce costs incurred, remove any duplicate or unnecessary tasks carried out by our supply chains and more clearly demonstrate our efficiency to customers.

Building Capability

The Procurement Team will build the Group's knowledge and experience to undertake and support procurement through an updated version of a "Passport to Procure"- a training programme designed to help staff understand the role of procurement, manage procurement compliantly in conjunction with the Procurement Team, use the Public Contracts Scotland portal for low value procurement and become smarter buyers on behalf of the Group.

The Contract and Supplier Management ('CSM') enables the Group to maximise the value it derives from its contracts and help to facilitate partnership approaches with key suppliers. This approach will be supported by software to automate and streamline workflows to conduct effective CSM across the Group. Contract Managers and Administrators will have access to a CSM e-learning course to ensure that they have the requisite skills and knowledge to manage their contracts and utilise the software appropriately.

In order to fulfil our strategic vision and aims we have an agreed approach to ensure continuous improvement through a process of external assessment and accreditation. This process will support Business Leads with nationally recognised external frameworks against which they can set improvement activities and measure improvement. The Procurement Team will support the Group's external accreditation programmes in the following areas:

- **Customer Service Excellence (CSE)** – offers a framework which allows us to validate that the products and services we provide are designed around our customers' needs, ensuring our customers are delighted with the service they receive.
- **Investors in People (IiP)** – provides a framework which allows us to validate that we manage, support, encourage and develop our people, realising their potential and creating staff who advocate strongly for the Group to fellow employees, our customers and wider stakeholders.
- **PCIP (Procurement & Commercial Improvement Programme)** - PCIP is an onsite audit which provides a means of measuring and reporting on the procurement and commercial capability of organisations through the provision of evidence, based around a series of set questions and other evaluation methods.

Collaborative Procurement Approach

The Procurement Team has a strong track record of collaborative procurement, offering its frameworks for other contracting authorities to utilise and using external frameworks to maximise buying power. The Procurement Team is engaged with key partners in the areas where we work, notably The City of Edinburgh Council, Glasgow City Council, Dumfries and Galloway Council and South Lanarkshire Council to share knowledge, experience and conduct collaborative procurement where appropriate.

As an associate member of Scotland Excel, the Group has access to a wide range of corporate and capital frameworks. This access to framework contracts has delivered efficiencies and financial benefit to the Group. The Group is also a participant on the West Territory Hub through Scottish Futures Trust. We are actively discussing potential collaboration with other Hub territories in our other geographies. Other framework providers being used by the Group include the Scottish Procurement Alliance (SPA), Northern Housing Consortium (NHC), Health Trust Europe, Places for People, Crown Commercial Service, ESPO, Scottish Government and Procurement for Housing (PfH). The Group's procurement programme has been aligned with framework and dynamic purchasing systems availability to ensure contracting for optimal solutions with the best placed suppliers is realised. The overarching requirement to achieve Value for Money remains our key focus.

Procurement includes supporting the role of suppliers in the Group's business continuity arrangements. Working collaboratively with the Business Continuity team, the Procurement Team works with business owners to improve the robustness of our business continuity plans through desktop and scenario testing, building requirements where appropriate into our contracts. Key areas include new build homes, repairs, IT service providers, and facilities management.

Wheatley Housing Group / City Building (Glasgow) LLP Joint Working Principles

The Group holds a 50% stake in City Building (Glasgow) LLP. Glasgow City Council holds the remaining stake. City Building (Glasgow) LLP delivers repairs, general maintenance, and investment work within the Group's Registered Social Landlords in the south and west of Scotland (including Wheatley Homes Glasgow, Wheatley Homes South and Loretto Housing), and the Group's commercial housing and property management subsidiary, Lowther Homes. City Building (Glasgow) LLP also delivers repairs and maintenance services to Glasgow City Council.

We are working to develop a collaborative approach to managing procurement, where appropriate, with the City Building (Glasgow) LLP team. This will be developed and agreed in line with the Group's compliance and legislation principles, reflecting best value and sustainability through the supply chain, determining the most effective route to market, jointly supporting SMEs, effectively benefiting the customer through the efficient management of Community Benefits, and ultimately promoting excellence in procurement and service delivery. City Building (Glasgow) LLP currently manages its own procurement policy. The Group expects City Building (Glasgow) LLP to operate in line with its own procurement policy and for this policy to be subject to approval by Wheatley Group and GCC.

Funding

Procurement can contribute to the effective cost management of the Group by leveraging the size and scale of the Group, where appropriate. It is understood that this should not be at the expense of being rooted in local communities. This will be delivered through large scale framework contracts, either procured by the Group or utilising external ones, which incorporate Community Benefits. The Procurement Team will have a key role in monitoring savings and value for money including the outputs of the Community Benefits programmes which will be recorded within a benefits tracking schedule.

The Group recognises the growing significance of ESG (Environmental, Social, and Governance) outcomes. While our lenders have not made sustainability considerations a mandatory condition of our loans just yet, we are proactively steering towards a future where our commitment to sustainability forms part of our procurement decision-making.

Through the use of purchasing cards across the Group, the subsidiaries and their teams can make local buying decisions for low value spend. The use of purchasing cards supports a more efficient VAT return process and improves security of staff through reducing the use of petty cash. Suppliers will receive same day payment while the Group will have up to 30 days to pay. This will also reduce the need for suppliers to be added to the supplier database, providing a cost saving.

Alignment to other Group Strategies

Procurement is not just about cost and quality, it encompasses the wider elements of sustainability, economic, social, and environmental measures to generate savings and identify efficiencies that can be reinvested in other areas of the Group. This Strategy is therefore part of a coherent strategic approach that complements and is aligned with our Group strategic documents.

Given the need to remain agile and flexible through the life of the Group's five year strategy, an annual review considers what has been delivered to date, our business operating context and the external operating environment. The Procurement Team will be involved in the annual review of our five year strategy, and associated Delivery Plans, and this Procurement strategy updated as appropriate.

Digital & Technology Strategy

Technological innovation and digital transformation will enable us to improve how we deliver services to our customers and communities over the coming years. Procurement will complement the aims of our technology strategy, ensuring that:

- Our technology services meet our business outcomes, are supported and secure;
- We develop more integrated service delivery options, ensuring that our business keeps pace with advancing technology and delivery approaches; and
- We continue to develop our technology solutions so that they support the delivery of more effective, efficient services aligned with Group digital ambitions and with our partner organisations.

Implementing and adopting new digital operating models requires new approaches to supplier engagement, flexibility in the delivery of shared outcomes and management of commercial, information and innovation risks. At the same time, procurement transparency and compliance will be delivered through the use of relevant frameworks such as Crown Commercial Services and Scottish Procurement.

The Procurement and Digital Technology Solutions Teams will work collaboratively to deliver an ongoing procurement programme to support this critical area of spend. Key areas include:

- improving technological infrastructure and access to SAAS and cloud services;
- improving business processes and enabling the delivery of more effective services;
- support for Group-wide digital transformation across the services and channels we deliver to our customers;
- simplification and consolidation of services and vendor offerings;
- automating processes; and
- improving business delivery and decision making.

Sustainability Framework

Our recently approved sustainable procurement policy makes clear we will derive positive environmental impact from the £300m we spend each year on goods, services and works. Minimising environment impact will become embedded in every purchasing decision, in the same way that value for money, statutory compliance and risk management are today. We will expect our supply chain, including our City Building (Glasgow) joint venture, to rise to this challenge by ensuring they reduce emissions in their business and have the skills and solutions to deliver, maintain and repair low emission products and services.

We recognise our impact on our environment does not stop at the activities we undertake directly. The goods and services we procure and the processes that support manufacture and delivery also contribute to the climate crisis. As such, we have a duty to understand these wider emissions and act to minimise them. We will do this through building our knowledge and expertise in this area and requiring suppliers to provide a base line of the whole life carbon emissions associated with their product or service.

Priorities will include reducing carbon emissions in our energy supplies, waste minimisation and increasing the use of recycled products and products derived from reclaimed or sustainable materials.

We expect our suppliers to meet our standards for sustainability as set out in our Sustainability Strategy. The requirements will vary according to the commodity being procured but we expect all our suppliers to demonstrate their compliance with good sustainability practice throughout the supply chain. Procurement will start to measure Scope 3 emissions data from its key suppliers and contractors. The range of data to be measured will include purchased goods and services, asset emissions, fuel and energy consumption, transportation and waste generation.

The Procurement Team will adhere to requirements of the Sustainable Procurement Duty, as set out by the Procurement Reform (Scotland) Act 2014. Under this legislation, we are required to consider how we can improve social, environmental, and economic wellbeing outcomes as part of contracting activities.

W.E. Are Wheatley

The Group's strategy aims to position diversity and inclusion at the heart of the Group. We are positive about promoting equal rights for all of our staff and in the way we conduct our business. In May 2014 we introduced our campaign 'W.E are Wheatley' which focuses on ensuring that no-one is excluded as a result of any of the protected characteristics as defined in the Equalities Act 2010. We have clear goals and will continue to engage with staff, encourage participation and help to influence Wheatley policies and practices. Our Procurement Policy and Procurement Strategy recognises equality and diversity criteria in accordance with equality legislation. Through our procurement processes we will challenge our suppliers to not only confirm compliance with legislation but to reflect our aspirations for equality and diversity in their working practices. We will seek to promote exemplars through our supplier meetings and forums.

As part of the Group's new strategy "Your Home, Your Community, Your Future", three new key outcomes are to be developed in keeping with the W.E Are Wheatley theme. These are W.E Think, W.E Create and W.E Work.

W.E Think

To build on the success of the Group's "Think Yes" culture, the aim of W.E Think is to transform our culture and our thinking in order to create value for customers in different ways as they increasingly self-serve and do more for themselves. This strategy recognises the importance of this to the Group and the Procurement team will assist staff and customers where possible to ensure that outcomes delivered by our "Thinking Yes Together" culture can be supported within the auspices of Procurement Regulations.

Where required, Procurement will engage with staff and customers on the fundamentals of procurement and foster innovation through market research at project conception stage. This will assist project teams to set out their approach to a project and refine their requirements.

W.E Create

A key strand of W.E Create is to stimulate innovative thinking in our communities. Procurement can play a key role in this initiative by providing a suitable forum for innovative discussion with different market sectors to help bring ideas to reality.

A synergy to this is the continuous improvement model embedded into our new approach to Contract and Supplier Management. Innovative ideas and concepts will be part of routine contract management reviews held between the assigned contract manager and the supplier.

W.E Work

The objective of W.E Work is to reshape staff roles and the operating model of the Group as we become more digitally focused over the next five years. As work roles are re-designed, the profile of the Groups contracting requirements may also change with freelance work options becoming a possibility.

Procurement will support the Group to deliver new contractual requirements in line with changes to the Group operating model including innovative digital solutions and actively participate in sharing our expertise to develop the skills of our staff.

4. Procurement Pipeline

The Group’s external expenditure in 2022/23 was £294.3m of which 67% (£196.8m) was on capital and 33% (£97.5m) on revenue. The Groups new build housing programme and investment in existing homes contributes to the capital spend.

The Group spend budgeted for goods, services and works will be delivered using a combination of existing contracts, use of external frameworks and procurement of new contracts and frameworks.

New contracts will be established through the Group as the lead procurement body on behalf of the Group’s subsidiaries to maximise flexibility and leverage value for money. Where a procurement process is specialist in nature for a specific subsidiary or customer group consideration will be given to the “contracting authority” on a case-by-case basis.

Implementation

A range of activities have been identified which will allow us to achieve our aims and objectives. These are divided into the following three areas, more detail on which can be found in the following tables:

- a) Strategy, Policy and Advice
- b) People and Organisations
- c) Processes and System

a) Strategy, Policy and Advice			
<p>The Procurement Team will work closely with customers to identify how we can add most value to support delivery of the Group’s strategic priorities.</p> <p>We will continue to provide excellent customer service to our customers and suppliers and act as a centre of excellence of procurement for the Group. We have developed a clear procurement policy and supplementary guidance for staff on how to purchase goods, services and works. We will work closely with business owners and budget holders in respect of producing a culture of trust and innovation and aim to deliver right-first-time services.</p> <p>We will also continue to ensure compliance with relevant legislation and integration with Group policies and processes by regular review of our processes and regular training of our staff.</p>			
Identified Factor	Future Priorities	How	Target Date
Procurement Strategy	The Procurement Team will work with business owners, budget holders, customers, key stakeholders and	Workshops with key stakeholders	Ongoing from

	suppliers to regularly review this Strategy.	On-going review for publication annually.	January 2024.
Best Value / Value for Money	The Procurement Team will, in line with legislation, award all contracts on the basis of the 'Most Economically Advantageous Tender' (MEAT) principle. For all procurement, we will consider the key principles set out in this Strategy and award contracts in a clear, transparent, and proportionate manner. It will be ensured that applied ratios (cost/quality) are rigorously tested prior to advertising. The applied ratios will take into account qualities such as continued costs, whole life costing throughout the life cycle of the contract, financing and depreciation. The Procurement Team will also ensure that in all procurement activity economic operators are treated equally and without discrimination, in order to encourage greater competition, promote innovation and encourage a wider range of economic operators to become involved in public procurement. This will assist in delivering value for money and achieving Best Value.	<p>Training and awareness sessions for the Procurement Team.</p> <p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs</p>	Ongoing
Excellent Service Delivery	The Procurement Team will support customers, business owners, budget holders and stakeholders to delivery excellent customer service and save money across the group.	<p>Procurement Team attendance and input to project groups, tendering, general advice and supporting alternative delivery models.</p> <p>Introduction of "Customer Accounts" and account management</p>	Ongoing
Communication	We will engage and communicate effectively with all internal and external stakeholders, including community representatives and user groups	Training and awareness sessions for staff.	Ongoing

	<p>affected by the procurement, to ensure those affected directly and indirectly by regulated procurement are considered. We will do this by market testing, supplier engagement, and feedback sessions with stakeholders at all stages throughout the procurement process and UIG meetings with internal team members. In doing so, we will consider the best practice principles set out in the National Standards for Community Engagement. The outcomes of these consultations will then be considered, and outputs will be used to assist in implementing our procurement policy.</p> <p>We will ensure that local suppliers and SMEs are aware of how to tender for our contracts, and we will ensure our tender processes reflect a local dimension where this is appropriate.</p> <p>All regulated procurement opportunities shall be advertised on Public Contract Scotland.</p>	<p>Regular meetings with suppliers.</p> <p>Introduction of 'Customer Accounts' and account management</p>	
Individual Needs	<p>We will utilise our collective strength to procure goods and services which meet the needs of the Group, while recognising individual and specialist needs of particular customer groups.</p>	<p>Regular UIGs with all stakeholders.</p>	<p>Ongoing</p>
Contract and Supplier Management	<p>We intend to develop and adopt a new Contract and Supplier Management approach and process for all Regulated contracts. This will maximise efficiency and instil a continuous improvement cycle to our contracting.</p> <p>The new CSM process will be administered via a software solution in order to record performance of our suppliers and automate the process as far as possible. The software will also act as electronic contract receptacle to hold our contract information digitally and securely. It will also generate a "live" Contracts Register for the Group</p>	<p>Regular meetings with suppliers.</p> <p>Use of Supplier KPI Scorecards</p> <p>Continuous improvement cycle to be part of everyday contracting. (i.e., How can we do things better?)</p> <p>Mutual efficiencies and cost savings for</p>	<p>Ongoing</p>

	<p>that can be published online as per our statutory requirements.</p> <p>We will continue to develop strong working relationships with our supply chains to ensure high-quality, cost-effective services.</p> <p>We will carry out our regular reviews of our supplier database to increase efficiency and drive effective working practices.</p> <p>We intend to further build on our successful “Meet the Buyer” events, where SMEs and other businesses can meet with public sector buyers and find out more about what we procure, and how.</p>	<p>both the Group and Suppliers</p> <p>Intervention of supplier issues at an early stage to prevent bigger issues leading to contract or supplier failure.</p> <p>360-degree contract management enabling suppliers to have their say.</p>	
<p>Compliance with:</p> <p>Procurement Legislation</p> <p>Procurement Reform (Scotland) Act 2014</p> <p>The Public Contracts (Scotland) Regulations 2015</p> <p>The Procurement (Scotland) Regulations 2016</p>	<p>We will support all Group and subsidiaries to act in accordance with the Groups Standing Orders, the Procurement Policy and Procurement Manual.</p> <p>We will ensure all updates are implemented where not already in place by the completion date: -</p> <ul style="list-style-type: none"> ▪ Agree revisions required to the procurement strategy on an annual basis. ▪ Continue to consider lot structure within tenders to ensure quality and opportunity for SMEs. ▪ Increase market research at strategy stage. ▪ Incorporate changes to legislation/procedures in light of Brexit. ▪ Comply with the use of the Single Procurement Document (“SPD”) 	<p>Training and awareness sessions for staff.</p> <p>Introduction to updated Passport to Procure eLearning tool.</p>	<p>Ongoing</p>

Performance Framework	We will review our compliance regime to monitor “off contract” expenditure and using our best endeavours, manage the transition to a 100% compliance target from a number of legacy contracts and informal procurement arrangements.	Created a performance framework to monitor KPIs including off contract spend. Reported monthly to ET and quarterly to Wheatley Solutions board.	Ongoing
Document Standardisation	We will undertake a complete review of all procurement standard documentation to take cognisance of legislative change. Regular review meetings are held with the legal team and documentation is kept up to date according to legislation and lessons learned.	Review of documentation by Legal team. Regular review to take account of good practice.	Ongoing
Terms and Conditions	We will support the business to use standard terms and conditions for all low value procurement in accordance with the Group Standing Orders, the Procurement Policy and Procurement Manual.	Provide access to template documents on WE Connect Training and awareness sessions for staff. Regular review for compliance.	Ongoing
Contracts Register	We will publish our contracts register on our website at www.wheatley-group.com . The Register is a live document and is updated on a regular basis.	Procurement Team will be responsible for managing the Contract Register on behalf of the Group. The Contract Register will be regularly updated.	Ongoing Monthly
Community Benefits	We will build from our good practice and look to apply robust, relevant, and proportionate Community Benefit Clauses at every appropriate opportunity and in line with the	Include consideration of Community Benefit Clauses in all procurement above £2m for Works	Ongoing

	<p>legislative requirements outlined in the 2014 Act.</p> <p>We will ask suppliers to deliver new jobs, apprenticeships, and training opportunities through their Community Benefit requirements.</p> <p>In utilising Community Benefit Clauses, the Procurement Team will seek to achieve the aims and objectives of the Wheatley Foundation and improve the economic, social or environmental well-being of the local areas in which they operate. In order to do so, we will engage with the local community in order to understand the needs of the area and tailor Community Benefit Clauses to these needs.</p> <p>From 2023, we will use our Group customer equality data and work with the Wheatley Foundation to analyse our employability programmes to inform our Community Benefit approach from the next statement review.</p> <p>https://wheatley.interactgo.com/Interact/Pages/Content/Document.aspx?id=42969</p>	<p>contracts and above £200k for all other contracts.</p> <p>Engage with our suppliers to contribute to the Wheatley Foundation.</p> <p>Use customer equality data to analyse employability programmes, engaging with the Wheatley Foundation</p>	
Small – medium sized enterprises (SMEs)	<p>We recognise that procurement activities can contribute to our local communities. In this regard, we will ensure that local suppliers and SMEs are aware of how to tender for our contracts, and we will ensure our tender processes reflect a local dimension where this is appropriate.</p>	<p>Introduction of our “Quick Quote” system for lower value/ lower risk procurement</p> <p>Review all larger procurements to consider the option of splitting them into smaller lots, which may encourage SME participation.</p>	Ongoing
The Living Wage	<p>We are committed to fair work practices and the Procurement Team will encourage and promote the payment of the Living Wage to all employees servicing the Group through external</p>	<p>Scored in accordance with the quality evaluation criteria contained within each procurement.</p>	Onwards

	<p>contracts, in line with Scottish Government Guidance on the Living Wage. This will be promoted through all tender exercises conducted by the Procurement Team and considered alongside other relevant factors at the outset of each procurement to ensure an appropriate balance between quality and cost and on a proportionate basis based on the scope, size, and place of performance of each contract.</p> <p>We are currently exploring full Living Wage accreditation. If and when the Group signs up to this accreditation, all current and future exercises procuring services that meet the Living Wage Foundation’s criteria will have an essential requirement to pay all workers involved in the delivery of the service at Living Wage level or above. Where contracted staff cannot be moved onto the Living Wage immediately, we will roll out the Living Wage across third party contracts over time, as the contracts come up for renewal in accordance with milestones agreed with the Living Wage Foundation as part of our accreditation.</p> <p>The Procurement Team will promote and evaluate fair work practices including the living wage as an element of quality within a tender.</p>	<p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs</p>	
<p>Supported Businesses & Social Enterprises</p>	<p>In line with Regulation 21 of the Public Contracts (Scotland) Regulations 2015 we reserve the right to participate in procurement for the award of a public contract or framework agreement to a supported business or to provide for such a contract or framework agreement to be performed in the context of a supported employment programme.</p> <p>Via our Joint venture with Glasgow City Council City Building Glasgow fully own</p>	<p>Identify opportunities to develop and support enterprises which fit with our vision and business needs.</p>	<p>Ongoing</p>

	<p>and operate Royal Strathclyde Blindcraft Industries (RSBi), one of the largest supported manufacturing businesses in Europe. RSBi employs over 250 people, more than 50% of whom have a registered disability.</p> <p>RSBi supply all the Group requirements for manufactured kitchens, door sets and UPVC windows to our new build and investment works.</p>		
Health and Safety	<p>We will support the Group’s commitment to compliance with the Health and Safety etc. Act 1974 and all related provisions and legislation including the Construction (Design and Management) Regulations 2015 and we will expect all of our suppliers to fully comply with the legislation and promote good working practices throughout the supply chain.</p> <p>Assessment of health and safety requirements will be considered on a case-by-case basis and will be monitored by contract managers on an ongoing basis to ensure compliance.</p> <p>We expect suppliers to be responsible for implementing measures to respond to identified risks and will ask suppliers where appropriate for evidence of said measures and of compliance with health and safety legislation.</p>	Promotion through all tender exercises conducted by the Procurement Team.	Ongoing
Fair and Ethical Trading	<p>In support of Scotland’s Fair-Trade Nation status, we will look to demonstrate delivery of real and lasting impact by reducing poverty and improving the lives of people in the communities that we serve.</p> <p>We will also work with existing suppliers to increase the range and availability of fair and ethically traded goods and services.</p>	Include a requirement for suppliers to evidence their commitment to fair and ethical traded goods and services to be included in their Expressions of Interest and Tenders.	Ongoing

	We will seek assurances of fair and ethical practices in supply chains from our suppliers and will include conditions relating to the performance of the contract to ensure that the economic operator complies with environmental, social and employment law. We will also consider lifecycle costing as part of our tender processes.		
Prevention of Modern Slavery	We will put in place safeguards in our contracts to prevent the use of slaves in compliance with the Modern Slavery Act 2015.	We shall implement this through the use of clauses in technical specifications, award criteria or contract conditions and is embedded within our procurement policy.	Ongoing
Provision of Food	In all regulated procurements relating to food, we will actively consider how we can improve the health, wellbeing and education of the local communities that we serve, in line with our sustainable procurement duty. We shall actively consider animal welfare standards in the context of each relevant regulated procurement and will promote the highest standards of animal welfare with our suppliers.	Promotion through all tender exercised conducted by the Procurement Team.	Ongoing
Sustainability and the Sustainable Procurement Duty	In line with our sustainable procurement duty, we will take a robust approach by actively considering all sustainability issues at the outset of any regulated procurements to support the Group's Sustainability Strategy. This will include considering whether or not to include Community Benefit Clauses at every appropriate opportunity in order to improve the social, environmental and economic wellbeing of the areas in which we operate. The Procurement Team will review all larger procurements to consider the option of splitting them into smaller lots in order	Training and awareness sessions for staff. We shall implement this through the use of clauses in technical specifications, award criteria or contract conditions.	Ongoing

	<p>to facilitate greater access to procurements and promote innovation.</p> <p>The Scottish Government’s Scottish Public Procurement Prioritisation Tool and Sustainability Test will be utilised in order to assess sustainability risks and opportunities in line with the Group’s Sustainability Strategy.</p>	<p>Monitored and reported via KPIs.</p>	
Payment Terms	<p>We will support requisitioners and approvers across the Group to ensure that all purchasing is carried out using approved system and processes including Purchase to Pay (P2P) and will seek to ensure that the following payments are made within 30 days after a valid invoice for payment is presented:</p> <ul style="list-style-type: none"> ▪ Payments due by the Group to a contractor ▪ Payments due by a contractor to a sub-contractor ▪ Payments due by a sub-contractor to a sub-contractor <p>Contractual provisions relating to payment terms will be incorporated into the terms and conditions of each regulated procurement.</p>	<p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs.</p> <p>Report published in line with HMRC requirements.</p>	Ongoing
Business Continuity	<p>We will support the Group’s business continuity arrangements by working with key suppliers who will help to provide the Group’s response in the event of a business impact event.</p>	<p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs.</p>	Ongoing
External Audit	<p>We will comply with legislative requirements to undertake external audit.</p>	<p>Formal Request from Scottish Government.</p>	Ongoing

b) People and Organisations

Effective implementation of this Strategy is dependent on having staff with the right skills and experience in place with strong professional relationships with client departments and suppliers. We seek to empower staff with the correct training and skills to provide an excellent customer service experience and to allow for asset growth. We identify that developing collaborative relationships across the sector will help us to deliver on our key strategies.

Identified Factor	Future Priorities	How	Target Date
Customer Service	We pride ourselves on our excellent customer service and in line with our Key Strategic Platform for Customer Service Excellence we will continue to provide excellent customer service and supplier contract management by building strong and positive professional relationships.	Training sessions for the Procurement Team.	Ongoing
Group Growth	As the size of our Group increases, we will agree a transition plan for consolidation of the supply base, taking into account the types of contracts in place, geographical diversity and length of contract for new Group partners/subsidiaries.	Transition plan for contracts for DGHP.	Ongoing
Training	<p>We will support procurement staff to become professionally trained and all permanent staff are encouraged to undertake regular Continuous Professional Development.</p> <p>Introducing the rollout of our online training for Service Department staff 'Passport to Procurement' to increase confidence and ensure compliance for dealing with procurements under £50K in terms of the 'Quick Quote' procedure.</p>	<p>Professional training programme for all procurement staff.</p> <p>Passport to Procurement eLearning tool updated for all staff involved in procurement.</p>	Ongoing
Collaboration	We will seek out opportunities to use collaborative contracts established by other organisations (including central government procurement service, Scotland Excel, Procurement Scotland, local authorities, Procurement for Housing etc.) where it offers us better value for money than conducting our own	Engagement with external framework providers.	Ongoing

	procurement and meets our business needs.		
Criminal Convictions/Serious and Organised Crime	<p>We view criminal conduct of our suppliers very seriously and work closely with Police Scotland including an Information Sharing Protocol. As a standard term of contract, we require all suppliers to complete a Declaration of Non-Involvement in Serious and Organised Crime.</p> <p>We are expressly required to exclude a business from bidding if it, or someone who holds a senior position in it, has been convicted of specific offences as detailed in the Procurement Reform (Scotland) Act 2014 or the Public Contracts (Scotland) Regulations 2015 unless there are exceptional circumstances as mentioned in section 58(6) to overriding reasons relating to public interest, such as public health or protection of the environment.</p>	<p>Implement Information Sharing Protocol.</p> <p>Use of appropriate clauses in tender documentation.</p>	Ongoing
Exclusion of Bidders	<p>The Procurement Reform (Scotland) Act 2014 Act and the Public Contracts (Scotland) Regulations 2015, specifically Regulation 58, detail that as a contracting authority we are required to exclude a potential supplier from bidding for contracts for certain reasons as detailed in the aforementioned legislation.</p> <p>Furthermore, the legislation also allows us to use our discretion to exclude bidders where certain specific circumstances as set out in Regulation 58 of the aforementioned regulations are met.</p> <p>Such exclusions are subject to statutory time limits.</p> <p>In terms of Regulation 58(13) of the Public Contracts (Scotland) Regulation 2015, suppliers who are in breach of certain exclusion grounds have the ability to 'self-clean' by providing a summary of the circumstances and any remedial action</p>	<p>Awareness training for Procurement Team and all staff involved in procurement.</p> <p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs</p>	Ongoing

	<p>taken. We will consider the sufficiency of any such evidence submitted in line with the legislation, and if deemed sufficient will not exclude the supplier. If the evidence is deemed insufficient, we will give the supplier a statement of reasons for this decision.</p> <p>We expect main contractors to be responsible for ensuring the supply chain of potential sub-contractors complies with the legislation and a declaration confirming same shall form a standard term and condition of contract.</p>		
Detection and prevention of fraud	Should staff become suspicious of bidders acting in a potentially fraudulent manner such activity must be reported in writing (together with any supporting evidence) in accordance with the Fraud Procedure. All reporting of anti-competitive behaviour and fraud will be dealt with in accordance with the Group's Whistleblowing Policy.	<p>Training and awareness sessions for staff.</p> <p>Regular review for compliance.</p>	Ongoing
Continuous Improvement	We are developing a pro-active approach by anticipating future procurement needs and identifying and considering alternative delivery options as part of continuous improvement.	Procurement Team attendance and input to project groups, tendering, general advice and supporting alternative delivery models.	Ongoing
Gifts and Hospitality	All staff involved in procurement must comply with the Group's policy on Gifts, Hospitality, Payments and Benefits.	Awareness training for Procurement Team and all staff involved in procurement.	Ongoing
Conflicts of Interest	The Group contributes to the economies of the areas we work in and has commercial and business relationships with many different companies,	Awareness training for Procurement Team and all	Ongoing

	<p>contractors, suppliers, and service providers.</p> <p>We will take appropriate measures to prevent, identify and remedy conflicts of interests arising in the conduct of procurement procedures so as to avoid any distortion of competition and to ensure equal and non-discriminatory treatment of all economic operators.</p>	<p>staff involved in procurement.</p> <p>Referring to policy and legislation.</p>	
Equality, Diversity and Inclusion (EDI)	<p>We require suppliers to adhere to strict ethical standards and behavior, and in return the Group will also demonstrate the highest level of ethical standards.</p> <p>All procurement will be conducted such that all suppliers with the necessary abilities have a fair and equal opportunity to secure Group business. The Group will be fair, honest, and transparent in all dealings with Suppliers and avoid any conduct which is capable of being adversely interpreted. All suppliers will be treated equally and without discrimination. The Procurement Team will review all larger procurements to consider the option of splitting them into smaller lots in order to facilitate greater access to procurements.</p> <p>We have added the existence of an EDI policy as a desirable requirement in our Procurement Policy to highlight our commitment to this to potential suppliers. By retaining this as a desirable rather than an essential, this helps ensure we are not discriminating for example against SMEs who may not have a policy. We will track and report on this requirement through our CMS.</p>	<p>Awareness training for Procurement Team and all staff involved in procurement.</p> <p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs</p> <p>EDI policy as a desirable requirement, monitored and reported through CMS</p>	Ongoing

<p>Equal Treatment, Non-Discrimination, Transparency and Proportionality</p>	<p>The Procurement Team will act in a transparent and proportionate manner at all times and at all stages of each procurement. In line with legislation, electronic communication will be available for all procurement activity, all procurement documentation will use plain and concise language in order that it is readily understood by all participants, and the Procurement Team will ensure open and public market engagement.</p> <p>Procurement shall comply with Section 8 of the of the Procurement Reform (Scotland) Act 2014</p>	<p>Utilise Public Contracts Scotland web portal to procure contracts.</p> <p>Procurement will use templates to ensure that the wording used is consistent and clear to tenderers.</p> <p>The team will comply with procurement regulations at all times and ensure that all internal stakeholders receive training and guidance on procurement</p>	<p>Ongoing</p>
<p>Procurement of Health and Social Care Services</p>	<p>We will procure Health and Social Care services in line with the provisions of Regulation 74 of the Public Contracts (Scotland) Act 2015 and also Section 12 of the Procurement Reform (Scotland) Act 2014</p>	<p>Implementation of the processes in the legislation</p>	<p>Ongoing</p>

c) **Process & Systems, P2P, Benefits Tracking, E-Procurement**

This element of the Strategy is essential if the Group is to achieve efficiencies in our procurement process. If we do not have detailed processes and effective systems, which are adhered to, savings achieved through the tender process will not materialise. We aim to look for new and innovative ways to work and develop and train our staff to utilise technology in order to achieve this.

Identified Factor	Future Priorities	How	Target Date
Supplier onboarding	<p>To ensure all purchasing is transparent and in line with the Group's Financial Codes, the Purchase to Pay team has introduced a No Purchase Order No Payment process. Suppliers will be given information on how to do business with the Group when they are onboarded.</p> <p>In future all suppliers will be expected to complete onboarding documentation electronically to improve efficiency, minimise risk of fraud and improve accuracy of information on the database.</p>	<p>Contractual obligations contained within the terms and conditions of engagement.</p> <p>Monitored and reported via KPIs.</p>	Ongoing
Purchase to Pay (P2P)	<p>We have implemented a number of system improvements to help suppliers to be paid on time and accurately.</p> <p>To be publicly report in line with HRMC requirements.</p>	Monitoring & reporting	Annually on 31 st March
Purchase Cards (PCard)	<p>PCard's have been fully launched and rolled out across the Group.</p> <p>The PCard system provides increased visibility and transparency of spend across the Group. This allows for greater reporting procedures and faster, more efficient payments for suppliers.</p>	Group policy and procedural documentation.	Ongoing
Supplier Management	<p>We have implemented a streamlined, strategic approach and facilitating a standardised approach to supplier management across the Group to develop and improve relationships and payment targets for suppliers. We will monitor the supplier onboarding process to ensure that suppliers are processed efficiently.</p>	To be monitored and KPIs to be reordered.	Ongoing

<p>E-Auctions</p>	<p>E-auctions are a simple, transparent procurement method where suppliers compete online. We consider the use of E-auctions at strategy stage for some contracts which we deem suitable and where there are tangible benefits in doing so.</p> <p>We will evaluate the use of e-auctions for contracts and consideration should be given to appropriateness and benefits that may be achieved if used to tender other contracts.</p>	<p>Route to market to be strategically evaluated by the Procurement professional.</p>	<p>Ongoing</p>
<p>Benefits Tracking Database</p>	<p>From early 2022, Benefits Tracking will be measured using the new contract management system's reporting functionality.</p> <p>Community Benefits and other financial/non-financial benefits will be monitored as part of quarterly contract management review meeting held between the Group and its supply chain.</p> <p>The CMS system will track progress of delivered benefits over the course of the contract. Contract Managers will be responsible for ensuring that the supplier's target are being met in accordance with the contract.</p>	<p>Awareness training for Procurement Team and all staff involved in procurement.</p> <p>To be monitored.</p>	<p>Ongoing</p>

Procurement of large-scale expenditure above Regulated and PCSR 2015 thresholds is provided at Appendix 1.

5. Appendix 1 – Outline Procurement Programme

Potential Future Contractual Opportunities

The table below shows examples of potential procurement opportunities which may become available over the next 24 months, once confirmed, all available contractual opportunities will be advertised on Public Contract Scotland procurement portal.

Procurement	Approx. Value	Route	When
4 WHS Demolition Projects	£1m	National Framework	Pending Award
Translation & Interpretation Services	£200k over 4 years	National Framework	Delivery 2024
Land Testing & Surveying Works Framework	TBC	Wheatley Framework	Delivery 2024
Household Items & White Goods	£1.5m over 4 years	Subject to Procurement Plan	Delivery 2024
Decant & Emergency Accommodation Services	TBC	National Framework	Delivery 2024
Taxi and Vehicle Private Hire	£80k over 2 years	Subject to Procurement Plan	Delivery 2024
Procurement of West Craigs Plot 13 - New Build for Wheatley Homes East	£23.5m over 2 years	Wheatley Framework – Direct Award	Delivery 2024
Procurement of Duke Street - Refurbishment for Wheatley Homes Glasgow	£2m over 12 months	National Framework – Mini Competition	Delivery 2024
Group Telecommunications Consultancy 2024 - 2027	£1m+ TBC	Subject to Procurement Plan	Delivery 2024
Group Landscaping Framework / Contract	£2m+ TBC	Wheatley Framework / National Framework / Open Market	Delivery 2024
Gas Audit Reports	£200k over 3 years	National Framework - Direct Award	Delivery 2024
Sash Window upgrade (Lowther / JV)	£500k over 1 year	National Framework – Mini Comp	Delivery 2024
Various Demolitions Projects Group Wide	Various - TBA	TBA	Delivery 2024
Satisfaction & Performance Related Research Services	£TBC over 4 years	National Framework	Delivery 2024
Rope Access Surveys (Wheatley Homes East)	£200k over 1 year	Open Tender	Delivery May 2024
The Provision of Fuel Cards	£1m over 4 years	National Framework	Delivery 2024

The provision of loan security valuation & associated services	£TBC over 4 years	National Framework	Delivery 2024
Asset Management System - Support and Maintenance	£400k over 3 years	National Framework	Delivery 2024
Corporate Business Intelligence Review - Phase 2	£200k over 4 years	National Framework	Delivery 2024
Temporary & Supported Accommodation Security Services (Wheatley Homes South)	£650k over 2 years	National Framework	Delivery 2024
Job Management Software System (Wheatley Homes South)	£650k over 4 years	National Framework	Delivery 2024
In House Repairs Sub-contractors all trades (Wheatley Homes South)	£6m over 3 years	Tender Process	Delivery 2024
Mobile Working Software System	£650k over 3 years	National Framework	Delivery 2024
Network Services	£TBC over 3 years	National Framework	Delivery 2024
IT Research Services	£250k over 2 years	National Framework	Delivery 2024
Application Management Service Report	£70k over 2 years	National Framework	Delivery 2024
Care Equipment - Maintenance and Repair (WHS)	£200k over 3 years	National Framework	Delivery 2024
Laundry Equipment	£1m over 4 years	National Framework	Delivery 2024
Lowther – Commercial property portfolio services	£100k	National Framework	Delivery 2024
Co-Location Services	£200k over 3 years	National Framework	Delivery 2024
Lone Working Application & Associated Products	£150k over 3 years	National Framework	Delivery 2024
Virtual Desktop Hosting (VDI Project)	£TBC over 4 years	National Framework	Delivery 2024
Rent Consultation - Mailing & IT Services	£400k over 3 years	National Framework	Delivery 2024
IT Research Services	£120k over 2 years	National Framework	Delivery 2024
Application Management and Support Services	£75k over 2 years	National Framework	Delivery 2024
WHS - Gas Heating & Low Carbon Heating Replacement Programme	£3.3m over 5 years	Subject to Procurement Plan	Delivery 2024

WHS – Kitchen Replacement Programme	£1.4m over 3 years	Subject to Procurement Plan	Delivery 2024
WHS – Bathroom Replacement Programme	£1.9m over 5 years	Subject to Procurement Plan	Delivery 2024
WHS – Cyclical Painting and Joinery Works	£2.0m over 5 years	Subject to Procurement Plan	Delivery 2024
WHS – Electrical Upgrade Works	£1.2m over 5 years	Subject to Procurement Plan	Delivery 2024
WHS - Adaptation Works	£3.8m over 5 years	Subject to Procurement Plan	Delivery 2024
WHS – EICR Programme	£420k over 2 years	Subject to Procurement Plan	Delivery 2024
Procurement of 5 sites - New Build for Wheatley Homes East	£50m over 2 years	Wheatley Framework / National Framework / Open Market	Delivery 2024 - 2025
Procurement of 7 sites - New Build for Wheatley Homes Glasgow	£60m over 2 years	Subject to Procurement Plan	Delivery 2024 - 2026
Procurement of Wyndford - New Build for Wheatley Homes Glasgow	£50m over 2 years	Wheatley Framework / National Framework / Open Market	Delivery 2024 - 2026
Group wide solution for EV Charging points	TBA	Framework or Open Tender	Delivery 2024 - 2025
Mechanical and Electrical compliance services	£30m over 5 years	National Framework or Open Tender	Delivery 2024 - 2025
Group wide District Heating – Supply / Maintenance / Services Review	TBA	National Framework or Open Tender	Delivery 2024-2025
Janitorial Supplies	£900k over 4 years	Subject to Procurement Plan	Delivery 2025
Corporate Hotel & Travel Services	£350,000 over 2 years	Subject to Procurement Plan	Delivery 2025
Secure Document Archiving & Scanning	£140,000 over 2 years	Subject to Procurement Plan	Delivery 2025
Cycle to Work Scheme	£85,000 over 2 years	Subject to Procurement Plan	Delivery 2025
Mobile Voice and Data Services	£800k over 3 years	National Framework	Delivery 2025
Voice of the Customer Software	£600k over 3 years	National Framework	Delivery 2025
Cyber Security Software	£325k over 3 years	National Framework	Delivery 2025
Secret Server Solution	£150k over 3 years	National Framework	Delivery 2025
Back up as Service (BaaS)	£700k over 3 years	National Framework	Delivery 2025
Contract Management Software System	£200k over 3 years	National Framework	Delivery 2025

IT Private Cloud Platform (IaaS)	£1m over 3 years	National Framework	Delivery 2025
Licensing, Support and Maintenance for Care Management System	£75k over 3 years	National Framework	Delivery 2025
Data Centre Co-location and Hosting Services	£175k over 3 years	National Framework	Delivery 2025
Print Equipment and Associated Services	£300k over 3 years	National Framework	Delivery 2025

Contracts delivered in the previous 12 months

The table below shows procurement opportunities which were delivered in the previous 12 months and are now showing live in the Contracts Register advertised on the Wheatley Group website.

Procurement	Approx. Value	Route	When
Void Trauma Cleaning Services	£250,000	Framework Agreement	Jan 2023
Anti-Social Behaviour and Domestic Abuse SaaS System	£347,992	Framework Agreement	Jan 2023
Technical Consultancy Framework Agreement	£55,000,000	Tender Process	Jan 2023
Fuel Hardship Support	£1,350,000	Negotiated Contract	Jan 2023
Social Care Agency Staff	£160,000	Framework Agreement	Jan 2023
Demolition Service of Wyndford	£11,740,000	Framework Agreement	Jan 2023
Licensing, Support & Maintenance Contract for Care Management System	£61,792	Negotiated Contract	Jan 2023
Co-Location Services	£131,760	Framework Agreement	Jan 2023
Demolition WHS Multi sites	£259,000	Framework Agreement	Jan 2023
District Heating Network Efficiency Project	£2,000,000	Framework Agreement	Feb 2023
Utility Meter Services	£900,000	Framework Agreement	Feb 2023
Social Housing Net Zero Retrofit Project - Works	£10,500,000	Framework Agreement	Feb 2023
Social Housing Net Zero Retrofit Project – Professional Services	£500,000	Framework Agreement	Feb 2023
Security Personnel Services	£1,300,000	Framework Agreement	Feb 2023
Provision of Motor Insurance Policy	£891,000	Tender Process	Mar 2023
Installation of EV Charging Points Phase 1	£132,814	Framework Agreement	Mar 2023
IT Network Consultancy Services	£225,000	Negotiated Contract	Mar 2023
Provision of Property Stock Damage Insurance Policy	£2,440,000	Negotiated Contract	Mar 2023
Provision of Cyber Liability Insurance Policy	£123,000	Negotiated Contract	Mar 2023
Provision of Combined Liability Insurance Policy	£944,000	Negotiated Contract	Mar 2023
Development East Lane	£9,002,855	Framework Agreement	Mar 2023

Provision of an External Finance Auditor	£3,700,000	Framework Agreement	Mar 2023
Cycle to Work Scheme	£85,000	Framework Agreement	Mar 2023
Corporate Hotel and Travel	£350,00	Framework Agreement	Apr 2023
Safety and Security Services – WHS Temporary Supported Accommodation	£233,724	Framework Agreement	Apr 2023
Secure Document Archiving & Scanning	£140,000	Framework Agreement	May 2023
Development Ewart Place	£11,613,864	Wheatley Framework	May 2023
Network Data Connectivity Services	£752,718	Framework Agreement	May 2023
Development Deans South – Phase 1B	£9,184,434	Negotiated Contract	Jun 2023
Unified Communications Services for Customer First Centre	£2,451,189	Framework Agreement	Jun 2023
Publishing, Print, Design & Associated Services	£730,000	Framework Agreement	Jul 2023
Void Maintenance and Repairs Contract – Lowther	£5,280,000	Dynamic Purchasing System	Jul 2023
Provision of Managed Detection and Response Services	£349,860	Framework Agreement	Aug 2023
Shandwick Street	£10,209,628	Wheatley Framework	Aug 2023
Job Management System – WHS Renewal and WHE Implementation	£2,590,071	Framework Agreement	Aug 2023
Health & Safety Incident Management System	£140,000	Framework Agreement	Oct 2023
Microsoft Dynamics 365 Marketing Project	£66,300	Framework Agreement	Oct 2023
Online Learning Platform System	£200,688	Framework Agreement	Oct 2023
Rent Consultation – Mailing & IT Services	£125,124	Framework Agreement	Nov 2023
Grounds Maintenance Equipment, Maintenance, & Repairs Service	£950,000	Framework Agreement	Dec 2023
Human Resource Software System	£337,000	Framework Agreement	Dec 2023
Gateway and Threat Protection Services	£71,579	Framework Agreement	Dec 2023
Void Property Default Energy supplier	Concession	Open Tender	Dec 2023

Firewall Replacement & Core Redesign	£165,670	Framework Agreement	Jan 2024
Development Shawbridge Arcade	£16,500,000	Wheatley Framework	In Progress
Development Victory Lane, Wallyford	£4,146,768	Negotiated Contract	In Progress
Development Ashgill Road	£10,450,782	Wheatley Framework	In Progress
Development Winchburgh BB	£15,664,055	Wheatley Framework	In Progress
Development Calton Village Phase 2	£26,411,105	Wheatley Framework	In Progress
Development Wallyford Area 5	£17,178,042	Wheatley Framework	In Progress
Development St Crispins	£2,256,198	Wheatley Framework	In Progress
WHS - Grounds Maintenance Contract	£2,400,000	Framework Agreement	In Progress
WHE - Lift Maintenance Services	£660,000	Open Tender	In Progress
Corporate Cleaning Services	£5,400,000	Framework Agreement	In Progress

6. Appendix 2 – Legislative References

The following table sets out the sections of this Procurement Strategy which relate to the requirements set out in the Guidance under the Procurement Reform (Scotland) Act 2014 issued by the Scottish Government on 17 March 2016 and also in accordance with SPPN 4/2021, to disclose the publication of this strategy to Scottish Ministers

Legislation	Section	Legislative Reference	Strategy Reference Page.
Procurement Reform (Scotland) Act 2014	S.15	To have a Procurement Strategy	Full strategy
Procurement Reform (Scotland) Act 2014	S.15(1)(b)	Annual review of strategy	Full strategy
The Public Contracts (Scotland) Regulations 2015	Reg. 39	Occasional joint procurement	6, 13
Procurement Reform (Scotland) Act 2014	S.9	Sustainable procurement duty	7, 11, 17, 28
Procurement Reform (Scotland) Act 2014	S.8	General duties (equality, non-discrimination, transparency and proportionality)	6, 9 16, 34, 35
The Public Contracts (Scotland) Regulations 2015	Reg. 5	Thresholds	8, 9
Procurement Reform (Scotland) Act 2014	S.3		
Procurement Reform (Scotland) Act 2014	S.15(5)(a)(i)	Functions and Purpose	Full strategy
Procurement Reform (Scotland) Act 2014	S.15(5)(a)(ii)	Delivering value for money	6,11,14,15, 17,20, 21, 30
Procurement Reform (Scotland) Act 2014	S.15(5)(b)(ii)	Consulting and engaging with those affected by our procurements	6, 11, 12, 13, 16, 18, 20, 21
Procurement Reform (Scotland) Act 2014	S.15(5)(7)	Living Wage	25
Procurement Reform (Scotland) Act 2014	S.35	Contract Register	24
Procurement Reform (Scotland) Act 2014	S.15(5)(b)(i)	Community Benefits	7, 11, 14, 15, 24, 36

Procurement Reform (Scotland) Act 2014	S.9(1)(a)(ii)	Small-medium sized enterprises	7, 14, 22, 23, 25
Procurement Reform (Scotland) Act 2014	S.11	Supported Businesses	26
Procurement Reform (Scotland) Act 2014	S.15(5)(b)(iv)	Health and Safety	27
Procurement Reform (Scotland) Act 2014	S.15(5)(b)(v)	Fair and Ethical Trading	27
Modern Slavery Act 2015	S.54	Transparency in the supply chain	28
Procurement Reform (Scotland) Act 2014	S.15(5)(c)(i) S.15 (5)(c)(ii)	Provision of food	28
Procurement Reform (Scotland) Act 2014	S.15(5)(d)	Payment terms	29
The Procurement (Scotland) Regulations 2016 Procurement Reform (Scotland) Act 2014 The Public Contracts (Scotland) Regulations 2015	Reg. 8 Reg. 9 S.27 Reg.58	Criminal Convictions/Serious and Organised Crime	31
The Public Contracts (Scotland) Regulations 2015	Reg.25	Gifts, Hospitality and Conflicts of Interest	32
Procurement Reform (Scotland) Act 2014	S.7	Dynamic Purchasing Systems	14
The Public Contracts (Scotland) Regulations 2015	Reg.36	E-Auctions	36
Concession Contracts (Scotland) Regulations 2016	All Regulations	Procurement of Concession Contracts	8

Guidance Requirement	Legislation Reference	Requirement	Strategy Page No.
2.5.1	15(5)(a)(i)	Contribution to carrying out of functions and achievement of purposes	Full Strategy
2.5.2	15(5)(a)(ii)	Ensuring Value for Money	6,11,14,15, 17,20, 21, 30
2.5.3	15(5)(a)(iii)	Equal Treatment and Non-Discrimination	6, 9, 18, 33, 34
2.5.4	15(5)(a)(iii)	Acting in a transparent and proportionate manner	6, 9 16, 34, 35
2.5.5	15(5)(a)(iii)	Sustainable Procurement Duty	7, 11, 17, 28
2.5.6	15(5)(b)(i)	Community Benefit Requirements	7, 11, 14, 15, 24, 36
2.5.7	15(5)(b)(ii)	Consulting and Engaging	6, 11, 12, 13, 16, 18, 20, 21
2.5.8	15(5)(b)(iii)	Living Wage	25
2.5.9	15(5)(b)(iv)	Health and Safety	27
2.5.10	15(5)(b)(v)	Fairly and Ethically Traded Goods	27
2.5.11	15(5)(c)	Regulated Procurements involving provision of Food	28
2.5.12	15(5)(d)	Payments within 30-day timescales	29

Would you like more information?

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Wheatley Housing Group Limited is a company limited by guarantee and registered in Scotland under the Companies Acts, having its registered office at Wheatley House, 25 Cochrane Street, Glasgow, G1 1HL. It is registered with The Scottish Housing Regulator as a registered social landlord. Company registration no. SC426094 Social Landlord no. 363