

This Purchasing Policy sets out the University's expectations with regard to the purchase of all goods, services and works in order to achieve the best possible value for money from University funds.

The Policy sets out guidance and rules to ensure the requirements of the Financial Regulations are met, along with the University's external regulatory obligations. As a key

line with the \$000000 Off Payroll Working

- opportunities for dispute are minimised
- supply risks are avoided or managed effectively.

The amount of resource and activity dedicated to Contract Management activity should be proportionate to the contract that it supports.

Ο Πανεπιστήμιο Σουσεξ αναγνωρίζει τις υποχρεώσεις του σύμφωνα με τον Νόμο για την Ισότητα 2010, συμπεριλαμβανομένης της απαίτησης να γίνουν ρεαλιστικές προσαρμογές όπου είναι απαραίτητο για να ικανοποιηθούν οι ανάγκες των ατόμων με αναπηρία. Οι προσαρμογές μπορεί επίσης να θεωρηθούν για να υποστηρίξουν τις ανάγκες των ατόμων με σχετική κατάσταση υγείας ή που προκύπτουν από εγκυμοσύνη ή μητρότητα ή άλλες σχετικές περιστάσεις όπου είναι κατάλληλο.

<https://www.sussex.ac.uk/about/sustainable-university/performance/sustainable-supply-chain/sustainable-procurement-framework>

The University recognises its obligations with regards to the Equality Act 2010 including, in the context of this policy, the requirement to make reasonable adjustments where necessary to meet the particular requirements of disabled members of staff. Adjustments may also be considered to support the needs of individuals with a relevant health condition or arising from pregnancy or maternity or other relevant circumstance where appropriate.

Areas of this policy which are recognised as potential areas for consideration are highlighted with the symbol below:



While every effort has been made to ensure that this policy supports these principles, it is recognised that there may be circumstances or needs in this policy.

In all cases when asked to make an adjustment to standard policy provisions the budget holder should carefully consider the circumstances with the member of staff concerned and, where the request is agreed, record that the adjustment has been considered and agreed in the relevant field in the finance system. This information should be relevant and proportionate and should not contain confidential information.

The Finance Service Desk can advise on all general queries but cannot discuss individual needs or circumstances. Budget holders should refer to their line manager, HR business partner, Head of School or Director of Professional Service as appropriate if they require further support regarding the reasonableness of a particular adjustment.

The Director of Finance (or their delegate) is responsible for considering all exceptions to the terms of this Policy, and for approving these where there is a demonstrable business need. This should normally be in advance of the purchase being made wherever possible.

Procurement and Commercial Services provide advice and support for all purchasing/ procurement activity. Their primary objective is to ensure that individual requirements can be met while ensuring that the University as a whole achieves maximum VFM through its procurement activity.

Anyone claiming reimbursement for out of pocket expenses has a responsibility to make bona fide claims in accordance with this Policy.

The Financial Regulations make provision for the delegation of responsibilities, including purchasing by Heads of School and Directors of Professional Service.

Where these are delegated, the Executive, Head of School or Director of Professional Service retains overall responsibility for ensuring the requirements of this Policy are met and that VFM is achieved. This aims to put control and responsibility as near as possible to the point of need.

Purchasing should be conducted using a competitive process wherever possible, as this will drive up quality, drive down prices and introduce innovation into the products and services offered to the University.

Weighting should be given to both cost and quality, regardless of the scale of the purchase, following considerations:

- conformance to specification
- environmental/sustainability considerations
- risk management
- delivery (time/location/method etc.).

The following limited exceptions to a competitive process are explained further in this policy:

- the University has already identified an appropriate source of supply of goods or services following a process intended to secure VFM
- the value of the purchase is small in relation to the cost of the buying

- payments are only made for goods, services and works received in accordance with agreed standards and terms.

The

In order to support financial and budgetary control, contractual compliance and the delivery of VFM the S&B will

This Policy sets out the circumstances in which these mechanisms should be used and the key considerations to be taken into account in each case. Further details on processes to be followed, and requirements and guidance with regards to specific personal and travel and related expenditure, is set out in appendices to this Policy.

To ensure that appropriate authorisation consideration can be given, relevant supporting information should be attached to any transaction within the finance system to demonstrate that the correct procurement process has been followed, that VFM has been achieved, the purchase is an appropriate use of funds and that it is being charged to the correct budget. This may include (but should not be limited to):

- Receipts/Proof of purchase
- written quotations
- tender waiver form (where appropriate)
- scoring summary of tender/quotation exercise
- contract summary page from agreed contract.
- status determination statement arising from Off Payroll Workers assessment under IR35 if the purchase relates to Off Payroll Working.

The efficiency and effectiveness of all purchasing mechanisms is reliant on the members of staff involved in the purchasing and authorisation process. Appropriate training and guidance is offered by the Finance Division to support this.

Purchase orders raised using the finance system are the principal mechanism for the purchase of goods, services and works in the University.

By sending a purchase order to a supplier, the University is effectively entering into a contract with that supplier based on the Standard Terms and Conditions or standard terms and conditions, unless other contract terms have been specifically agreed.

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It is therefore essential that no orders are placed with a supplier that will result in an invoice

- services are being purchased from the ~~£200,000~~ managed travel provider, in order to secure the price on offer
- the

Failure to comply with University requirements set out by the Director of Finance will result in appropriate follow up action being taken to recover the value of the advance:

- staff: salary deduction
- students: a charge to the Student account
- others: a charge to a nominated budget.

Owing to the limitations and risks to financial and budgetary control and VFM outlined above, all use of advances to fund purchases may be subject to regular

Commercial Services must be contacted immediately.

Information on sanctions can be found on the Finance website.

Policy title:	Procurement and Purchasing Policy
Date approved:	
Approving body:	University Executive Group
Last review date:	
Revision history:	
Next review date:	