



University of  
St Andrews

## Procurement strategy and action plan 2024

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<b>Purpose</b>	The Procurement Strategy, used in conjunction with institutional policy, sets out the strategic institutional approach to Procurement within the prevailing regulatory environment.

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- This document and forms associated with this document are available in an alternative format upon request.

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## 1. Executive Summary

Ever to Excel. The Strategic Plan of the University of St Andrews aspires to consolidate our position as one of the world's leading Universities while continuing to be the top ranked University in Scotland, we will continue to be a place where the values of the life of the mind are respected, nurtured and promoted.

The University's fundamental goal remains to attract and nurture the best staff and the most promising students from around the world and provide an environment in which they can produce their best work for maximum societal benefit.

The objectives of the University Strategy are grouped under five themes – **World-leading, Diverse, Digital, Sustainable, and Entrepreneurial** – and are underpinned by our commitment to social responsibility.

The University of St Andrews Procurement Strategy (the 'Strategy') is aligned with the University's Strategic Plan and ensures that in pursuing those themes our obligations for compliance with the Procurement Reform (Scotland) Act 2014 are met.

## 2. Procurement Strategy

The Procurement Strategy, used in conjunction with institutional policy, sets out the strategic institutional approach to Procurement within the prevailing regulatory environment. The Action Plan element of the Strategy translates the strategic objectives and aims into detailed actions and process required to deliver best value legally compliant Procurement Operations. Its focus is to build on the structure of engagement and support of all staff involved in procurement of goods, services and works on behalf of the institution.

### **3. Procurement Mission**

The Procurement mission is to *'drive the embedding and consistent application of best Procurement practice and to increase the sustainable value for money from the University non-pay expenditure through Advanced Procurement across the Schools, Units, Residences and Senior Management of the University of St Andrews'*.

### **4. Strategic Objectives**

The University of St Andrews is committed to obtaining value for money in all of its transactions, and in conducting its daily business staff must always consider the institutions wider responsibilities in terms of legal, moral, social, economic and environmental impact. Effective Procurement supports the key institutional objectives across these important operational dimensions.

- Continuing to engage and develop relationships with internal academic stakeholders, professional support service colleagues, senior management and the supply chain to deliver innovation and best value to the learning, research and service support communities through continuing development of effective and co-ordinated procurement activity.
- To promote the delivery of value for money through good procurement practice and optimal use of collaborative procurement opportunities.
- To develop sound and useful management information to measure and improve performance and support corporate planning.
- To seek out professional development opportunities to enhance the experience and capability of those engaged in the delivery of procurement (and our key stakeholders).
- Continue to explore and develop partnership and collaborative opportunities within the sector (including APUC and EAUC), with other publicly funded bodies, with Fife Anchor Institutions, with professional bodies, and appropriately with suppliers that will yield intelligence, innovation and deliver value to users of Procurement.
- To embed sound ethical, social and environmental policies within the Procurement function and to comply with relevant Scottish, UK, and EU legislation in performance of the Sustainable Procurement Duty.

## 5. Compliance with the Procurement Reform (Scotland) Act 2014

The table below links the requirements of the Procurement Reform (Scotland) Act 2014 to actions the University's procurement strategy.

Reform Requirement	Act	Requirement	Action/Strategy
Consulting and those affected by procurement	and those by	Mandatory ('Required')	Where appropriate, prior to a procurement exercise, the University will identify and consult with key stakeholders and suppliers affected by the upcoming procurement activity.
Publishing of strategy		Mandatory ('Required')	The University will publish, and update annually, the Procurement Strategy on the internet at <a href="https://www.st-andrews.ac.uk/media/procurement/procurement-strategy.pdf">https://www.st-andrews.ac.uk/media/procurement/procurement-strategy.pdf</a>
Ensure regulated procurements contribute to the University's functions and achievements		Mandatory ('Required')	Strategic procurement objectives are aligned to the University of St Andrews Strategic Plan. Relevant consultation will be conducted when developing a procurement strategy (applies to category and one-off procurement strategies also).
Ensure procurements deliver value for money		Mandatory ('Required')	Purchasing of goods and services will be subject to ongoing review [with APUC, end user / key stakeholder and where appropriate, supplier consultation]. Review will allow: <ul style="list-style-type: none"> <li>• Optimal category strategies and/or approach to market to be developed and agreed</li> <li>• Sensible aggregation opportunities identified</li> <li>• Most appropriate procurement routes to market chosen</li> </ul>

		<p>Where appropriate, collaborative contracts will be used to deliver improved contract terms, contract and supplier management, sustainable procurement outcomes and value for money.</p> <p>Quality, risk and sustainability factors, along with cost, will inform decisions to award regulated contracts.</p> <p>The University will ensure that it awards regulated procurements only to businesses that are capable, reliable and, where relevant, that can demonstrate that they meet high ethical standards and values in the conduct of their business.</p>
Ensure procurements treat economically operators equally and without discrimination	Mandatory ('Required')	<p>Appropriate early engagement will allow the University to understand the market for goods and/or services and potential alternative solutions.</p> <p>The University will conduct all regulated procurements in compliance with EU Treaty Principles of equal treatment, non-discrimination, transparency, proportionality and mutual recognition.</p> <p>The University will continue to take steps to make it easier for smaller businesses to bid for contracts. Legislative constraints preclude preferences for only local suppliers but the local dimension can be addressed through the structure of tenders, the use of Public Contracts Scotland, training, constructive feedback and information to build capacity, and publishing a contracts register to highlight contracts for which local organisations may be interested in bidding.</p>
Ensure procurements are transparent and proportionate	Mandatory ('Required')	<p>The University shall utilise portals including PCS / FTS to publish its procurement opportunities and shall strive to ensure appropriate use of lotting, output based specifications and clear evaluation criteria to ensure the procurement is accessible to as many bidders as possible.</p>

Sustainable procurement duty	Mandatory ('Required')	<p>To prioritise and assess sustainability risks and opportunities, the University will utilise a range of available tools. Including, where appropriate, Prioritisation, Flexible Framework, APUC's Code of Conduct, and APUC's Sustain tool.</p> <p>We will take our duty further and aim to embed sustainability into our Procurement decisions and put it at the heart of what we do.</p> <p>Consideration of environmental, social and economic issues and benefits will be made, where appropriate, and on a contract-by-contract basis during the planning stage.</p> <p>Sustainable and Ethical Procurement Policy is issued to suppliers where appropriate.</p>
Community benefits	Mandatory ('Required')	<p>The University's Procurement Policy outlines in more detail the community benefits policy.</p> <p>To summarise, for every procurement over £4m, and for all other projects where there is potential for Community Benefits to be achieved and it is appropriate to do so, the University will consider how it can improve the economic social or environmental wellbeing of its area through inclusion of community benefit clauses, to assist with its strategic objective of sustainable development. An example of a community benefit used is the requirement of a main construction contractor to employ an additional apprentice for the duration of a major project.</p>
Health and Safety	Optional ('Should')	<p>Where the delivery of goods, services or works results in suppliers carrying out work on site at one of the University's locations, the supplier will be required to adhere to the Health and Safety (H&amp;S) Policy. Where relevant, the H&amp;S Policy is included in tender documents to ensure all prospective suppliers are fully aware of the University's requirement prior to submitting a tender.</p> <p>For high-risk contracts, a dedicated H&amp;S team are consulted, and feedback included in ITT documentation.</p>

Fairly and ethically traded goods and services	Mandatory ('Required')	The University supports fairly and ethically traded goods. Where relevant it shall make use of appropriate standards and labels in its procurements to take account of fair and ethical trading considerations and will consider equivalent offerings from suppliers in its tenders.
Food	Optional ('Should')	The University will find practical ways to supply healthy, fresh, seasonal, local and sustainably grown food which represents value for money whilst improving the health, wellbeing and education of our teaching and learning communities, coupled with promoting the highest standards of animal welfare. The University will work to put in place affordable contracts, which meet the nutritional requirements for food for all users of our catering services.
Late payment legislation	Mandatory ('Required')	The University will comply with Late Payment legislation and will review, on a contract-by-contract basis, whether such obligations should be enforced and monitored further down its supply chain, viz: sub-contractors.

## 6. Annual Report

The University will produce an annual report on progress against these objectives and publish it on the University's Procurement website. This report, produced as soon as practicable after the end of the financial year, will describe how the University has discharged its obligations under the Procurement Reform Act and how it has exercised discretion and judgement as permitted by the public procurement rules to secure strategic objectives in compliance with the Act.

The Annual Report will include:

1. A summary of the regulated procurements that have been completed during the year covered by the report.
2. A review of whether those procurements complied with the authority's procurement strategy.

3. To the extent that any regulated procurements did not comply, a statement of how the authority intends to ensure that future regulated procurements do comply.
4. A summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report.
5. A summary of any steps taken to facilitate the involvement of supported businesses in regulated procurements during the year covered by the report.
6. A summary of the regulated procurements the authority expects to commence in the next two financial years.
7. Other information as the Scottish Ministers may by order specify.

### Strategic Ownership & Contact Details

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## 7. Procurement Strategy and Action Plan (Appendix 1 – Action Plan)

Objective	Outcomes	Key actions	Key Performance Indicators	Current Position
Procurement will support Academic Schools and Professional Services Units to enhance the learning, teaching, research and innovation experience, for the many and diverse needs of stakeholders, by providing innovative	Target the right people with the right information at the right time. Procurement's profile raised and relationships built with key stakeholders through regular and targeted communications. Mechanisms provided for Procurement to	Procurement will engage openly and positively with all stakeholder groups to deliver a Procurement service that supports the activities of the University now and in the future. Regular scheduled meetings with key stakeholder contacts.	Number of stakeholders that Procurement identifies as being key in terms of value of expenditure or value of risk Total expenditure for these key stakeholder areas Number and frequency of communications with key stakeholders.	All Schools and Units have representatives on the Procurement Buyer Network for dedicated communications, advice and opportunities / contacts for networking.  All staff have an open route to seek advice and offer feedback on services provided.

<p>solutions for their procurement decisions.</p>	<p>listen, understand stakeholders needs and implement improvement. Achieve consistency in communications by focusing on Procurement's key messages. Project an appropriate image of Procurement as being a client focused support function through consistent communications.</p>			
<p>Procurement will develop management information to measure and improve procurement and supplier performance, assisting key stakeholder areas in meeting their requirements for best value goods and services.</p>	<p>Maintain a Contract Register Procurement Website with guidance and training on Procurement legislation and processes. Contract management process in operation for all key suppliers</p>	<p>Category management in place for key spend areas to identify areas where aggregation of spend and collaborative agreements could be used to provide better value for money. Template documents produced for Procurement team to ensure strategy development will address how corporate social responsibilities - equalities, fair trade,</p>	<p>Total value of expenditure influenced by Procurement Team directly or indirectly Spend aggregated across the University to provide multiple School / Unit contracts providing economies of scale and avoiding disaggregation across contracts. % expenditure through collaborative agreements.</p>	

		governance, prompt payment, supporting local SMEs and sustainable procurement can be developed and achieved through regulated procurement contracts, and other appropriate contracts, embedding these responsibility objectives into tender documentation and evaluation criteria Contract management process applied to appropriate contracts and managed on a proportionate basis.		
Procurement will embed sound ethical, social and environmental policies within the University's procurement function to ensure compliance with relevant Scottish, UK and GPA legislation in performance of the sustainable	Embed requirements to maximise social, economic and environmental outcomes through contracting activities. Tenders will promote the Living Wage, specify that contractors demonstrate good employee relations and	Review of the University policy on how regulated procurements will be undertaken to ensure compliance with the sustainable procurement duty. Issuing the Sustainable and Ethical Procurement Policy to	Measurement of Scope 3 emissions showing a reduction where influenceable in procured good, works and services.	The Procurement Annual Report is published on the University Website annually.  The Procurement team contribute to the University's report on compliance with Climate Change Duties

<p>procurement duty. Including supporting the University's Strategic Plan 2022-2027 in its commitment to delivering net zero and promoting sustainability.</p>	<p>workplace matters, and high ethical standards and values in the conduct of their business i.e. Health and Safety at Work Fair and transparent opportunity and treatment for all current and potential suppliers including small and medium-sized enterprises (SMEs), third sector and voluntary sector organisations Support for the purchase of Fair and Ethically Traded goods and services.</p>	<p>tenderers as standard practice. Updating the Modern Slavery and Human Trafficking Statement. The University is committed to being Net Zero by 2035.</p>		<p>confirming that procurement activity has actively contributed to our obligations.</p>
<p>We will promote the delivery of value for money through good procurement practice and optimal use of procurement collaboration opportunities working with the supply chains to ensure continued value, managed performance and minimal risk throughout</p>	<p>A Contract Register that provides clarity on the status of all contracts and activities Comprehensive procurement strategies that facilitate the production of clear and concise specifications Suppliers managed to ensure they perform over the life of the contact.</p>	<p>Review annual expenditure analysis to understand regulated procurement and contracts in place and the cycle for the review and retender of these. Template documents are developed to ensure a consistent and appropriate approach to all procurement activity.</p>	<p>Total value of expenditure across University Total number of procurement staff No of strategic contracts No of managed contracts Value of savings and benefits generated.  Tracking and monitoring of Community Benefits</p>	<p>Regulated procurements have a contract strategy ensuring the best route to market is identified for each contract. Best value is considered in every contract with a balanced price/quality split. SMEs, supported businesses and social enterprises are considered where</p>

the life of contracts for the benefit of customers and students.			from appropriate contracts.	appropriate at strategy stage of contract.
Procurement will consider Procure to Pay methods Embedding an end-to-end process in contracts.	<p>Fewer Invoice transactions. Smooth payment of invoices.</p> <p>Most efficient method of invoicing used based on an assessment of the contract. Implementation of invoicing.</p>	<p>Consider payment methods at strategy stage for each contract.</p> <p>Issue guidance on payment methods. Work with finance to embed invoicing.</p>	<p>No of invoices received. Cost to process invoices.</p> <p>Efficiencies.</p>	<p>P2P is considered as part of every contract strategy and the most efficient payment method including early payment arrangements, consolidated invoices, catalogues, punch out, and invoicing. University procurement to have ownership of the supplier master data on the Financial Management System. No PO-No Payment is upheld and non-essential routes for requests for payment without PO are closed.</p>
Procurement will sustain and further develop partnerships within the sector, with other publicly funded bodies, with professional bodies and appropriately with	Partnerships within the sector and other public bodies which assist the development of potential procurement collaboration opportunities, and support and encourage	Review the expenditure of the University and manage on a category basis where possible.	Total value of expenditure across the University % expenditure through collaborative agreements.	Appropriate collaborative frameworks are utilised, the team sit on collaborative forums. The team have led on collaborative contracts with other Institutions.

supply markets that will yield intelligence, innovation and deliver value to users of procurement.	shared services initiatives which would attribute value to the University's activities. Reduction in the duplication of effort between the University and 'consortia' bodies for tendering activity.			
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## 8. Version control

Version number	Purpose or changes	Document status	Author of changes, role and School or unit	Date
1	IT Services transfer of web pages to new version of T4 – advised to move to GZ	Published	Adrian Wood, Director of Procurement	10 <sup>th</sup> July 2025