



**Affordable homes.  
Exceptional care.**

**Trust Housing Association Limited**

**Annual Procurement Report**

**April 2023 to March 2024**

<b>Published:</b>	<b>May 2024</b>
<b>Lead Officer:</b>	<b>Procurement Manager</b>
<b>Approved:</b>	<b>Director of Finance and People</b>

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## 1 Introduction

- 1.1 The Procurement Reform (Scotland) Act 2014 (PRA) requires any public organisation which has an estimated annual regulated spend of £5 million or more to develop and publish a procurement strategy. This requirement took effect from 31 December 2016. In addition, Organisations (including RSL's) are required to publish an Annual Procurement Report. This is the third Annual Procurement report for Trust Housing Association.
- 1.2 Trust Housing Association is a not-for-profit registered social landlord, regulated by the Scottish Housing Regulator, Care Inspectorate and Scottish Charities Regulator (OSCR). Trust is a national organisation, established in 1973 and now one of the largest housing, support and care providers in Scotland offering a range of housing and support services across the length and breadth of the country.
- 1.3 Our primary social rented offer includes a mix of general needs housing for households of all ages and later living housing (circa 4,000 units). We also provide some mid-market homes (56 units) and shared ownership (circa 38 units). We also act as a property manager for homeowners and sharing owners in areas where we have an interest (circa 400 units).
- 1.4 Our wide range of services from landlord only to care and support are flexible and tailored to the needs of individuals. This allows customers to live independently with an enhanced quality of life, and for their families to have peace of mind.
- 1.5 This report covers the period 1 April 2023 to 31 March 2024 and demonstrates the effectiveness of processes and transparency in procurement activity, highlighting performance and achievements in delivering the organisational Procurement Strategy in compliance with the requirements of the Procurement Reform Act.

## 2 Procurement Strategy

- 2.1 In 2021 a dedicated Procurement Team was established within the Finance and People Directorate to centralise the procurement function across the organisation. The team consists of a Procurement Manager and Procurement Assistant who, under the oversight of the Director of Finance and People, implement procurement strategy as well as undertake operational procurement activities.
- 2.2 The period covered by this annual report was supporting delivery of the **Procurement Strategy 2021-2023**. The key aim of this Strategy was the introduction of the centralised procurement function, with 10 key strategic objectives to enhance the effectiveness of the central procurement function;
  1. Introduction of Corporate Spend Analysis
  2. Redevelopment of Contracts Register
  3. Review of Governance & Policy
  4. Introduction of Standardised Operational Procurement Documents
  5. Introduction of Contract Strategies
  6. Introduction of Digital Hub & Procurement Service Support
  7. Centralised Contract and Supplier Management Framework
  8. Review of Supply Chain Code of Conduct
  9. Full utilisation of Public Contracts Scotland
  10. Vendor Base Reduction

- 2.3 9 out of 10 of the 2021-2023 key strategic priorities were delivered within the period of the strategy, with 1 project; Centralised Contract and Supplier Management still in progress and therefore carried into the next Strategy.
- 2.4 A new **Procurement Strategy 2024-2027** has been launched setting out the Procurement Team's strategic aims, objectives, and key priorities. The key aim of the 2024-2027 is empowerment of colleagues to own and manage low value, low risk procurement activities within the parameters of the Trust Procurement Framework. The central procurement team will continue to manager higher-value, higher-risk projects, including all regulated spend. 8 key priorities have been identified to further enhance the effectiveness of the central procurement function;
1. Centralised Contract and Supplier Management Framework
  2. Saving Opportunities and Regulated Spend Review
  3. Community Benefits Strategy
  4. Procurement Requirement Form and Staff Training
  5. Quantity Surveying and Consultancy Spend Review
  6. New Supplier Process
  7. Tendering for Capital Works Projects
  8. Business Continuity Planning
- 2.5 We continue to deliver commercially effective and compliant processes across the organisation and support the purchase of goods, services and works in a fair, transparent, and non-discriminatory manner, whilst complying with the regulatory legislation.

### 3 Summary of Regulated Procurements Completed

- 3.1 Where appropriate, Trust Housing Association has made use of collaborative contracts to deliver improved contract terms, to support contract and supplier management, and to meet with sustainable procurement outcomes and value for money. This has covered the best balance of resource, cost, quality, and sustainability.
- 3.2 In the period covered by this report, Trust provides details of its regulated procurements completed. These are set out in a list at the end of this report with details summarised in **Section 9**. This information, coupled with publication of the corporate Contracts Register provides visibility of Trusts procurement activity over the reporting period.
- 3.3 Between 1<sup>st</sup> April 2023 and 31<sup>st</sup> March 2024 Trust Housing Association spent approximately £24.9m incl. VAT in total as an organisation on the purchase of goods, services and works. The spend per supplier is reported on a monthly spend analysis sheet and periodically shared with key stakeholders around the business.
- 3.4 During the period, Trust made use of national and sectoral framework agreements for both regulated and unregulated spend thresholds from the following bodies:
- Crown Commercial Services
  - Scottish Government
  - Procurement for Housing
  - Scotland Excel
  - Scottish Procurement Alliance
  - [Fusion 21](#)

- [City of Edinburgh Consultancy Services Framework](#)
- [Link Housing Association New Build Contractors Framework](#)

3.5 Over the course of the period covered by this report the following regulated procurement exercises have been undertaken;

#### **GPA Regulated Procurements**

i.e. Goods & Services worth over £214,904 and Works worth over £5,372,609 (incl. VAT)

Total Value of Procurements **£14,504,000**

There were **6** such procurements completed

#### **PRA Regulated Procurements**

i.e. Goods & Services worth over £50,000 and Works worth over £2million

Total Value of Procurements **£265,000**

There were **3** such procurements completed

## **4 Review of Regulated Procurement Compliance**

4.1 In undertaking its regulated procurements, every care has been taken to ensure that Trust awards its contracts to suppliers who are capable, reliable and who can demonstrate that they meet high ethical standards and values in the conduct of their business.

4.2 Our procurement policy and procedure documents align fully with the Scottish Government Procurement Journey which follows best practice procurement in a legally compliant manner, and in line with the general duties of the relevant legislative Acts. Feedback received from suppliers that participated in our revised formal tendering processes has been highly positive, and Trust received ZERO complaints or legal challenges during 2023/24.

4.3 As demonstrated via the successful delivery of our ambitious Procurement Strategy, Trust is commitment to meeting all regulatory requirements and periodical legislative changes.

## **5 Community Benefits Summary**

5.1 The Public Contracts (Scotland) Regulations state for every procurement over £4m, Trust must consider how we can improve the economic, social, or environmental wellbeing of the local area through inclusion of community benefit clauses. This is to assist with achieving sustainability in contracts activity, including targeted recruitment and training, small business and social enterprise development and community engagement. Where possible, relevant, and proportionate, and where they are considered not to have a negative impact on the delivery of value for money, such clauses may also be included in regulated procurements valued at below £4m.

5.2 Trust's approach to identifying community benefits is carried out on an individual project basis through engagement and consultation with stakeholders. As part of the tendering process, tenderers will be asked to describe their approach to delivery of community benefits noted within the tender specification. Tenderers will also be encouraged to identify additional benefits or opportunities that will deliver social value throughout the performance of the contract. Community Benefits will always be considered on a proportionate basis.

5.3 In early 2023 Trust developed a Community Benefits Statement to be included in procurement exercises and appended to contract agreements of sufficient value. The statement details Trust’s approach to Community Benefits including the preferred types of activities and priority groups. A minimum requirements table has been developed for both construction works and goods / service contracts listing the mandatory activities to be undertaken based on value band thresholds.

5.4 Trust is committed to applying Community Benefits, where relevant and proportionate to do so, to the contract value thresholds noted below:

<b>Contract Type</b>	<b>Contract Value</b>	<b>Community Benefit Requirement</b>
Framework	>£500k	Retrospective Based on Spend
Goods / Services	>£500k	Mandatory or Evaluated
Works Contract	>£2m	Mandatory or Evaluated

5.5 Community Benefits have been included in the following contracts during the 2023/24 period:

Agency Staff Care & Support (Multiple Agreements)	Framework Call-Off
Domestic Gas Servicing & Reactive Maintenance	Framework Call-Off
Grounds Maintenance Services	Open Tender
Cleaning Chemicals & Washroom Solutions	Framework Call-Off
Commercial Gas Servicing & Reactive Maintenance	Framework Call-Off
Responsive Repairs, Voids, Out of Hours Works	Open Tender

## 6 Supported Business Summary

6.1 Regulation 21 of the Public Contracts (Scotland) Regulations 2015 allows public bodies the ability to reserve public contracts for supported businesses. Supported businesses provide essential job opportunities for disabled and disadvantaged people within our communities, enabling such employees to become more independent, while also delivering a range of excellent supplies and services.

6.2 Trust does not have any contracts which are currently delivered through a supported business and no contracts were awarded to supported businesses during this period.

6.3 In future periods, Trust is committed to seek out opportunity to award contracts to supported businesses where this is possible to do so, and Framework Agreements will be actively explored.

## 7 Future Regulated Procurements Summary

7.1 Increased collaboration is important to drive efficiency in the procurement process. The Procurement Strategy specifies that opportunities for external collaborative procurement require to be maximised to enable delivery of lasting savings, efficiencies and other benefits through procurement activity.

7.2 As part of the procurement strategy and in line with regulatory procurement compliance, spend analysis and supplier profiling activities are underway to identify supply commodities for future planned procurements.

- 7.3 When identifying procurement activities, Trust explore and access available collaborative contract types. This may be through contract award against national and regional Framework Agreements, or through collaboration and subsequent tendering of local contracts alongside other Housing Associations. An options summary is developed and discussed at the outset of each project.
- 7.4 It is acknowledged that collaboration through the aggregation of supply may favour larger suppliers that are better placed to compete for higher value contracts, therefore, Trust intends to consider the needs of SME's and locally or regionally based contractors to maximise benefits to local economic operators.
- 7.5 A summary of the planned regulated procurements for the period April 2024 to March 2026 is provided for view in Section 10.

## **8 Annual Procurement Report Responsible Officers**

- 8.1 Procurement and its governance is led and influenced by the following responsible officers:

The Procurement Manager & The Director of Finance & People

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Trust Housing Association  
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## 9 Regulated Procurements April 2023 to March 2024

Contract Reference	Contract Title	Supplier Name	Estimated Total Contract Value	Contract Start Date	Contract End Date
CE-21-026	Out of Hours Call Management Service - Telecare (Hanover) (ARC Alarm Receiving Centre)	Telecare	£129,000	01/04/2023	31/03/2025
AS-22-044	Warden Call, Smoke Alarm and Doors - Maintenance and Reactive Repairs	Tritec Solutions (Scotland) Ltd	£2,400,000	01/05/2023	30/04/2027
CE-23-104	Agency Staff Care & Support Framework	Various	£1,800,000	01/05/2023	30/04/2027
CE-23-104	Agency Staff Care & Support	HRC Recruitment	£556,000	01/07/2023	31/05/2025
AS-23-090	Domestic Gas Servicing & Reactive Maintenance	Saltire FM Ltd	£1,248,000	01/08/2023	31/07/2027
CS-23-116	General Stationery and Office Paper Supplies	Banner UK	£76,000	01/10/2023	30/09/2027
CE-23-125	Assisted Living Solutions	Currys Ltd	£60,000	01/10/2023	31/03/2024
AS-23-099	Grounds Maintenance Service Framework	Various	£1,500,000	01/10/2023	31/03/2027
AS-22-081	Responsive Repairs, Void Property Works, Out of Hours Works - Multi Lot National	Rodgers & Johnston Ltd	£7,000,000	01/12/2023	30/11/2027
<b>Regulated Procurements Completed &amp; Estimated Total Contract Value 2023/24</b>			<b>£14,769,000</b>		



## 9 Future Regulated Procurements April 2024 to March 2026

Financial Year	Contract Title	Expected Route to Market	Estimated Total Contract Value	Expected Contract Start Date	Expected Contract End Date
2024/25	Internal Audit Services	Open Tender	£55,000	01/04/2024	31/03/2029
2024/25	Travel & Accommodation Management	Framework Direct Award	£100,000	01/04/2024	31/03/2028
2024/25	Commercial Gas Servicing & Reactive Maintenance	Framework Direct Award	£2,400,000	01/04/2024	31/03/2029
2024/25	Stock Condition Surveys	Open Tender	£150,000	01/05/2024	30/04/2027
2024/25	Commercial Laundry Servicing & Reactive Maintenance	Open Tender	£600,000	01/05/2024	30/04/2028
2024/25	Provision of Cleaning Products	Framework Direct Award	£600,000	01/05/2024	30/04/2028
2024/25	Microsoft Licencing 365	Framework Mini-Competition	£240,000	01/08/2024	31/07/2027
2024/25	Gutter Cleaning and Minor Roof Repairs	Restricted Tender	£480,000	01/09/2024	31/08/2026
2024/25	Winter Maintenance Gritting	Open Tender	£440,000	01/11/2024	30/10/2026
2024/25	Fire Systems Servicing and Maintenance	Framework Mini-Competition	£325,000	TBA	TBA
2024/25	Window Cleaning	Restricted Tender	£268,000	TBA	TBA
2024/25	Legal Services (excluding Employment Law)	Open Tender	£400,000	TBA	TBA
2024/25	Personal Protective Equipment (PPE)	Framework Direct Award	£100,000	TBA	TBA
2024/25	Catering Equipment	Framework Direct Award	£160,000	TBA	TBA
2024/25	Bakery and Fruit & Veg	Framework Direct Award	£80,000	TBA	TBA
2024/25	Meat and Fruit & Veg	Framework Direct Award	£20,000	TBA	TBA
2024/25	MFD Printers at Developments	Restricted Tender	£100,000	TBA	TBA
<b>Planned Regulated Procurements &amp; Estimated Total Contract Value 2024/25</b>			<b>£6,518,000</b>		
2025/26	BT Superfast Broadband FTTP / SOGEA / FTTC for 67 Sites	Framework Agreement	£72,000	11/10/2025	10/11/2028
2025/26	Energy Performance Certificates	Direct Award	£110,000	01/08/2025	31/03/2026
2025/26	Warden Call Smoke Alarm & Doors Contract	Open Tender	£2,400,000	01/05/2025	30/04/2026
2025/26	HR Software Solution (SaaS)	Open Tender	£470,000	30/07/2025	29/07/2027
2025/26	Floor Coverings	Mini Competition	£700,000	01/08/2025	31/07/2026
2025/26	Furniture & Furnishings	Direct Award	£500,000	01/08/2025	31/07/2026
2025/26	Annual Lift Servicing & Maintenance	Open Tender	£300,000	01/11/2025	31/10/2026
2025/26	Out of Hours Call Handling Service (ARC)	Trust Contract	TBA	01/04/2025	30/03/2027
2025/26	Energy Supply - Gas and Electricity	Direct Award	TBA	01/04/2025	31/03/2026
2025/26	Responsive Repairs, Void Property Works & Out of Hours Emergency Works - Eastern Scotland	Open Tender	TBC	01/04/2025	31/03/2027
<b>Planned Regulated Procurements &amp; Estimated Total Contract Value 2025/26</b>			<b>£4,552,000</b>		

published by  
Procurement Service, Directorate of Finance & People  
June 2024

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