



Title	Procurement & Community Benefits Policy
Purpose	<p>The purpose of this policy is to provide a framework for how Maryhill Housing Association (MHA) will purchase, or 'procure', works, goods and services in a way which helps the achievement of strategic objectives and delivers value for money.</p> <p>This is designed to ensure that all such procurement will be done in accordance with all legal requirements, including Scottish Government legislation, in particular the Procurement Reform (Scotland) Act 2014.</p>
Scope	<p>The Board is responsible for approving, reviewing, and monitoring the outcomes of the policy.</p> <p>The Director of Resources holds the lead responsibility for this policy and accompanying Strategy, Annual Report, Procedures and Procurement Toolkit.</p> <p>This policy applies to all Board and Committee members, members of staff whether employees of MHA, freelance, casual, or temporary agency staff irrespective of grade, position, or length of service responsible for the management of properties within the Association.</p> <p>This policy applies to procurement carried out by MHA staff directly, by agents working on behalf of MHA and to any joint procurements undertaken.</p> <p>This Policy and accompanying Procedures replace the following policy documents:</p> <ul style="list-style-type: none"> • Sustainable Policy for the Procurement of Goods and Services – approved May 2016 • Community Benefit Requirements Policy – approved August 2016
Definitions	<p>Apprentice – a person defined as a New Entrant to the industry, both youth and adult, who is undertaking a recognised skill qualification and will operate under the Terms of the Scottish Building Apprenticeship and Training Council (SBATC) or an equivalent apprenticeship scheme.</p> <p>Contract – for the purpose of this policy 'contract' means the agreement with the supplier or contractor to deliver the goods, services or works. Depending on the contract value this can range from an exchange of emails through to detailed and formal contract award. The appropriate contract form for each category is set out in MHA procurement toolkit and procedures.</p> <p>Contract award – for the purpose of this policy 'contract award' means the point at the end of the procurement process when the decision is made on which supplier or</p>

contractor is to be deemed the successful tenderer and from whom MHA will purchase the goods, services or works. Where a contractor is appointed directly from a framework, the contract award date is when the signed letter of acceptance is issued to the contractor.

Contract value – for procurement assessment purposes the contract value is the total estimated value, excluding VAT, over the full lifetime of the contract including any potential extension periods, e.g., an annual spend of £10k on a 3 year contract with a 1 year extension clause = £40k contract value.

Full Tender – publicly advertised tendering opportunity carried out in accordance with MHA Category 4 & 5 procurement procedures.

FOI – Freedom of Information legislation and requirements, which will apply to MHA.

Frameworks – A procurement framework is an agreement put in place with a provider or range of providers that enables buyers to place orders for services without running lengthy full tendering exercises. Also, as frameworks are based on large volume buying, this can generate Value For Money (VFM) as they can enable individual buyers to access economies of scale and source services at lower prices, or with special added benefits and/or more advantageous conditions. VFM should not however just be assumed.

FTS – A new e-notification service called Find a Tender (FTS) used to post and view higher value public sector procurement notices. In January 2021 this replaced the requirement to publish notices in the Official Journal of the European Union.

GDPR – data protection legislation and requirements, which will apply to MHA.

New Entrant – is a person who is trained or employed to do a specific job and is leaving an educational establishment or a training provider, or a person that has been non-employed with no experience or a person with construction experience who has been unemployed for at least 6 months and is seeking employment. This may include on-site training and assessment, or offsite training, or offsite training or a mix of these.

Open Tender Process – where the tender opportunity is issued on PCS as a single stage process open to all bidders.

Procurement – the process of purchasing the full range of goods, services and works required to deliver MHA's activities. These range from small items purchased from the petty cash float to large housing development and planned maintenance works contracts awarded following a full tendering process.

Public Contract Scotland (PCS) – an electronic tendering system, advertising tendering opportunities within Scotland

Quick Quote – tendering process via the PCS website which is not openly advertised, but instead where MHA issue the opportunity to the selection of suppliers/contractors that MHA has assessed as most appropriate to potentially deliver the goods, services or works

Regulated procurement – procurement where the contract value is above the level set by the Procurement Reform (Scotland) Act 2014, and which therefore must be advertised openly on PCS and which must be reported on in the Contract Register and Annual Procurement Report. Currently £50,000 or above for goods & services, and £2m and above for works

Restricted tender process - where the tender opportunity is issued on PCS as a two-stage process, the first stage requires all bidders to complete an SSPD, a short list of bidders are then invited to participate in the second stage of tendering.

Small and medium size businesses – businesses with up to 500 employees and an annual turnover of up to £100m

Supported business – a business whose primary aim must be for the social and professional integration of disabled or disadvantaged persons, and also where at least 30 per cent of the employees are ‘disabled or disadvantaged’.

Threshold Values – Scottish Government published contract values above which specific types of organisations must advertise the tendering opportunity via FTS. Financial thresholds are reviewed and revalued by Scottish Ministers every two years. The next review of thresholds will be implemented in January 2022.

Policy Statement

1) Introduction

This policy describes how MHA will purchase, or ‘procure’, goods, services and works.

This policy sets out how MHA will manage procurement and establishes an overall framework for the procurement process that consists of the following:

Document	Purpose
Procurement & Community Benefits Policy	Establishes how MHA’s Board expects procurement related activity to be undertaken by the organisation.
Procurement Strategy	The strategy sets out how the Board’s policy will be implemented, how it will comply with legislation and how it will contribute to MHA’s overall vision.
Annual Procurement Report	A report detailing the procurement activity undertaken and assessing compliance with the procurement strategy during the preceding financial year.
Procurement Toolkit	This is an interactive tool that is completed by MHA staff for all relevant procurement and captures information for inclusion in the Contracts Register. It also includes detailed guidance on procurement and community benefits and links to template documents as appropriate to each category of procurement.

2) Legal & Regulatory Requirements

This policy has been developed with reference to:

- Public Contracts (Scotland) Regulations 2015
- Procurement Reform (Scotland) Act 2014

- Scottish Housing Regulator – Regulatory Framework – Standards of Governance & Financial Management for RSLs April 2019

MHA staff will also ensure any Scottish Procurement Policy Notes issued by the Scottish Government are taken into account as required.

3) Our Procurement Approach

MHA will adopt an open, transparent, fair, inclusive and proportionate procurement approach as set out in the following principles.

MHA will ensure that its procurement processes:

- are fair and comply with legal requirements, including FOI and GDPR
- are carried out in an economically, environmentally, and socially responsible manner which contributes to MHA's organisational strategic objectives.
- aim to achieve the best 'value for money' in a sustainable manner by appropriately assessing the best balance of cost, quality, and sustainability in each procurement decision.
- treat all suppliers and contractors equally and without discrimination.
- are operated in an open, transparent, and inclusive way.
- are proportionate to the item being procured, with the specific procurement approach adopted in each case being based on the nature, scale and value of the contract being awarded.
- are as simple, clear, and proportionate as possible to help facilitate the participation of small and medium size businesses, third sector organisations and supported businesses.
- operate in a manner that improves the economic, social, and environmental well-being within the communities in which we operate, with a particular focus on reducing inequality.
- maximise the inclusion of appropriate community benefits requirements.
- enable MHA to work creatively and collaboratively with partners to support the local economy in Maryhill and North Glasgow and identify opportunities for joint procurement initiatives.
- include relevant and proportionate consultation with our customers and other stakeholders, to enable the views of those affected to be expressed and taken into account.
- encourage contractors and suppliers to pay the Real Living Wage in Scotland and for relevant contracts require contractors and suppliers to pay the Real Living Wage in Scotland; promote compliance with the Health & Safety at Work etc. Act 1974; and contain commitments that MHA will ensure prompt payment of invoices to contractors and suppliers.
- ensure, where possible, that the goods and services purchased are fairly and ethically traded. For regulated procurement, MHA contract terms and conditions will enable MHA to end a contract if the contractor or subcontractor fails to keep to their legal duties in the areas of environmental, social or employment law when carrying out the MHA contract.

4) Procurement Strategy

MHA's Procurement Strategy is reviewed annually and published on the association's website <https://www.maryhill.org.uk/about-us/procurement/>

The Procurement Strategy underpins this policy and sets out in greater detail how MHA will address the procurement principles listed above.

5) Procurement Categories

To ensure a proportionate approach to procurement, this policy splits the procurement of goods, services and works into 5 categories of procurement method. Where repeat and predictable purchases are made from a specific supplier, these should be amalgamated to arrive at the relevant contract value:

Category	Contract Value Goods & Services	Contract Value Works	Procurement Method
Category 1	< £3,000	< £3,000	Suppliers Rates/Price List, or Existing Framework, or Single supplier, confirming price in advance in writing
Category 2	£3,000 to <£10,000	£3,000 to £10,000	Existing Framework, or Three written quotations in advance
Category 3	£10,000 to <£50,000	£10,000 to <£100,000	Existing Framework, or Tender via PCS Quick Quote
Category 4	£50,000 up to Threshold Value	£100,000 up to Threshold Value	Existing Framework, or Full Tender via PCS
Category 5	Threshold Value and above	Threshold Value and above	Existing Framework, or Full Tender via PCS plus FTS

Category 3 – use of the Quick Quote process means that the tenders are processed through PCS but are not advertised openly. Instead, MHA selects the suppliers/contractors that are being asked to tender. The Quick Quote process has been designed for use with lower value contracts. Whilst theoretically the Quick Quote process could be used for works up to £2m, MHA has restricted this to <£100,000 to ensure we openly advertise any works above that level.

Category 4 – complies with the Procurement Reform (Scotland) Act which requires that Regulated Procurement opportunities be advertised on Public Contracts Scotland (PCS) website when their estimated total contract value is equal to or greater than the following thresholds:

- **£50,000** for supplies/services
- **£2,000,000** for works

Category 5 – complies with the requirement that any procurement with an estimated contract value above Threshold Values must be published via the e-notification service Find a Tender (FTS) (this replaces the previous requirement to

publish in the Official Journal of the European Union (OJEU)) The opportunity must also be advertised on Public Contracts Scotland (PCS) website.

The Threshold Value currently in place and which will apply until January 2022 are:

- **£189,330** for supplies/services
- **£4,733,252** for works

6) Use of Frameworks

Procuring using an existing framework is one of the potential procurement methods available. As a public body, MHA has access to a number of Scottish Government frameworks. MHA can also join and access frameworks such as SPA and Procurement for Housing.

Consideration should always be given to using frameworks, as they can save time in procurement and also, they have the potential to deliver value for money. However, this cannot just be assumed, and for each procurement consideration should be given as to which procurement method offers the best fit to the specification requirements and value for money to MHA.

If the decision is taken to procure through a framework, the following approach must be followed:

- Where the framework identifies a sole provider and there is no option for mini competition, market testing should be carried out as part of the procurement assessment to ensure the framework offers value for money.
- Where the framework identifies a number of potential providers, a mini competition should be undertaken to help achieve value for money.
- Where the framework identifies a number of potential providers, and there is the ability to go straight to one provider rather than run a mini competition, this option should only be taken where a clear business case has been identified and approved at Director level.

7) Authority to Procure

The procurement process, up to but not including contract award, can be undertaken by any member of staff within MHA as long as they have been given an instruction to do so by a staff member who holds the appropriate level of delegated authority to award the contract (as this is the point MHA is committed to the expenditure).

a) Budgeted Expenditure

The decision to award the contract at the end of the procurement process, where the proposed expenditure is already included in the approved annual budget, requires approval in line with the delegated authority in the table below. For investment, cyclical or development works the relevant budget is set at specific project level:

Contract Value Goods & Services	Contract Value Works	Delegated Authority
Within budget AND < £3,000	Within budget AND < £3,000	Staff Grade 6 plus HR Assistant, HR Administrator, Development Graduate Trainee, Trainee Property Officer
Within budget AND < £5,000	Within budget AND < £5,000	Staff Grade 7
Within budget AND < £100,000	Within budget AND < £100,000	Staff Grade 8
Within budget AND < £250,000	Within budget AND < £250,000	Staff Grade 9
Within budget AND < £500,000	Within budget AND < £500,000	Director
Within budget AND < £1,000,000	Within budget AND < £1,000,000	Chief Executive
Within budget AND £1,000,000 or more	Within budget AND £1,000,000 or more	Board

b) Unbudgeted Expenditure

Where the proposed expenditure is not included in the approved annual budget because; it was not considered when the budget was drawn up, could not reasonably have been foreseen, or because the expenditure will result in an approved budget becoming overspent including overspent at project level for investment, cyclical or development costs, the decision to award the contract must be approved in line with the following levels of delegated authority:

- Contract Value <£25,000 – Director
- Contract Value <£100,000 – Chief Executive
- Contract Value £100,000 or above – Board

8) Exceptions

The normal procurement processes may be bypassed in the following exceptional circumstances:

- a) Emergency situations** – where, for emergency reason such as public safety, it is necessary to ensure works are carried out quickly, the most senior member of staff available may instruct works without going through the normal procurement processes. Any such emergency exceptions will be reported to the Chair as soon as possible and reported to the next Board meeting.
- b) Specialist works, goods or services** – where the nature of the item being procured requires use of a specialist supplier or contractor, MHA will seek to negotiate the most advantageous price and terms prior to placing an order or signing an agreement. Details of the discussions held and the reasons for

the final recommendation will be fully recorded and there must be clear justification for doing so. MHA staff should consider in all cases taking advice from a professional/technical adviser or procurement specialist in relation to the negotiation and must do so for procurements more than £50,000.

Approval to procure specialist works, goods or services with a contract value up to £50,000 must be obtained from the appropriate Director or the Chief Executive. Approval to procure for contract values above £50,000 must be obtained from the Board.

- c) Generic Items** – where the goods/supplies/services being procured are so generic and widespread that seeking tenders is not realistic and they also cannot be procured via a suitable framework, e.g., standard utility supplies, such as electricity, gas and broadband, or equipment such as IT supplies, vans, or power tools, then MHA should seek to obtain the most advantageous price through market rate comparisons. Approval to procure generic items via this exceptions route will comply with the approval levels set out at section 7 above.

9) Procurement Toolkit

MHA has developed a Procurement Toolkit, which is to be used by all MHA staff who are undertaking a procurement exercise for Categories 2 up to Category 5. Due to the lower value of Category 1 procurements, these do not need to be recorded in the toolkit.

The Procurement Toolkit captures key information and provides procedural guidance to staff as they progress through the relevant procurement stages of the process.

The Procurement Toolkit also captures the information necessary for the Contracts Register.

10) Contracts Register

MHA will keep and maintain a Contracts Register recording contracts that have been awarded as a result of regulated procurement. As a minimum the Register will be made available on the website and include the following:

- Contract name
- Date of award
- Name of Contractor
- Type of contract
- Estimated value of the contract
- Start date
- End date and details of any extension

11) Community Benefits

Community Benefit Clauses can be used to build a range of economic, social, or environmental conditions into the delivery of contracts. This provides added value

and contributes to the achievement of outcomes which benefit local communities and deliver wider social benefit.

One of MHA's strategic objectives is to address poverty and enable customers to make their lives better. MHA believes that we should lead by example by employing trainees, offering apprenticeships, and providing work placements and we therefore expect that our contractors will provide this kind of community benefit when they work with us. Projects and initiatives that stimulate the local economy will assist in the strengthening of the Maryhill and Ruchill communities and long-term sustainability.

MHA will comply with the legal duty for explicit Community Benefits clauses required on all contracts above £4m.

Additionally, MHA will consider including Community Benefits requirements for all procurement when purchases are over £50k for goods and services, and over £100k for works.

The community benefit provisions within the procurement process will focus on:

- Employment & Training
- Community Initiatives
- Environmental Improvements

The Association recognises that Community Benefits must be proportionate to the value of the contracts being procured and that a one size fits all approach is not possible.

A number of benefits are highlighted as 'Essential' and the contractor will be expected to address these as a minimum. The contractor can then indicate, subject to final discussion and agreement with MHA, how they propose to fulfil the remaining community benefit points requirement by selecting additional items from the essential or negotiable categories.

The actual level of community benefits to be delivered under the contract will be dependent upon the contract award value. The contractor's community benefit proposal should reflect their contract bid value rather than the Association's budget estimate. The actual community benefits provision will be discussed and agreed with the contractor in advance of the contract being awarded.

The contract will contain a clause that enables MHA to invoice at commencement of contract for the total value of the Community Benefits on the basis of 0.1% of contract value per 5 points, e.g., £10m contract with a community benefits requirement of 75 points would be invoiced £150,000. MHA will not seek payment for this invoice until the end of the contract, and will deduct the value of the community benefits that have been satisfactorily demonstrated as having been delivered, or where reasonable attempts at delivery can be evidenced, e.g. in this example if 60 of the 75 points were delivered during the contract, then the invoice would be reduced to £30,000.

	<p>The delivery of Community Benefits will be monitored regularly as part of effective contract management and reviewed by Senior Management Team and Appendix B sets out community benefit management and monitoring procedures for staff.</p>
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MHA Community Benefits Table

			Contract Value	<£100k	£100 to <£500k	£500k to <£2m	£2m to <£4m	£4m to <£10m	£10m to £15m	£15m +
contracts less than 24 months		TOTAL POINTS		5	10	15	20	30	35	70
contracts above 24 but less than 36 months		TOTAL POINTS		10	20	30	40	60	75	150
contracts 36 months or above		TOTAL POINTS		20	40	60	80	120	150	300
Category	Measurement details		Points per role or event or 0.1%value							
Employment & Training										
apprenticeships started or sustained	ongoing measurement in apprenticeship hours per week throughout the contract	Essential	4	n/a	n/a	min 1	min 1	min 2	min 2	min 4
apprenticeships started or sustained - local resident living in or returning to G20 postcode area	ongoing measurement in apprenticeship hours per week throughout the contract	Negotiable	6							
apprenticeships started or sustained - to individuals from BME or who is female	ongoing measurement in apprenticeship hours per week throughout the contract	Negotiable	6							
jobs created taken up by new entrants		Essential	4	n/a	n/a	n/a	n/a	min 1	min 2	min 3
graduate internships		Negotiable	3							

work placement (4 week)		Essential	2	n/a	n/a	min 1	min 2	min 3	min 4	min 5
short term school placement		Essential	1	n/a	n/a	min 1	min 1	min 1	min 1	min 2
holding or participating in a careers event locally - within G20 area		Negotiable	1							
Community Initiatives										
educational visit to local school - within G20 area		Negotiable	1							
annual participation in MHA volunteer days		Negotiable	1							
Cash or in-kind support to MHA Community Fund (0.1% contract value per 5 points)		Essential	5	n/a	n/a	min 1	min 1	min 1	min 1	min 1
Environmental Improvements										
Cash or in-kind support to MHA to deliver an identified environmental improvement (0.1% contract value per 5 points)		Negotiable	5							

Example calculations are shown in Appendix A

	<p>12) Opening Tenders</p> <p>Procurements undertaken of Category 3 and above are carried out using the Public Contract Scotland (PCS) website and electronic post-box facility. The Post-box is an online submission facility which allows buyers to receive responses from suppliers electronically in a secure environment. A full audit trail is kept of all access to the Post-box and a complete record of all supplier submissions is stored. This means that MHA no longer retain a tender register, as the PCS records perform this function.</p> <p>Tenders submitted to the PCS post-box are locked until the submission deadline and can only be accessed by staff designated by MHA as the tender post-box openers.</p> <p>Procurements at Category 1 and 2 do not require full tender and therefore tender opening rules are not applicable. However, MHA will require email submissions of quotations to enable retention as appropriate of quotation details.</p> <p>13) Fraud, Theft & Anti-Bribery</p> <p>MHA’s commitment to preventing fraud, theft, and bribery from occurring and to developing an anti-fraud and theft culture is set out in our Fraud, Theft & Anti-Bribery Policy.</p> <p>This includes developing a culture where whistleblowing is encouraged, and whistle-blowers are supported – in line with the Association’s Whistleblowing Policy</p> <p>Procurement is recognised as an area where fraud, theft, bribery, and corruption can occur.</p> <p>All procurement must be undertaken in accordance with this policy and with reference to the Scheme of Delegation in respect of payment approvals.</p> <p>All staff will receive training on the Procurement & Community Benefits Policy, Fraud, Theft & Anti-Bribery Policy and Scheme of Delegation.</p>
Approval	Board – 26 th June 2023
Policy Owner	Director of Resources
Next Review	May 2024

Appendix A

Example Community Benefit Calculations

Example 1 – £150k services contract lasting 36 months

Points total = 40

Essential Items:

none

Selection from remaining items:

1 x graduate internship = 1 x 3 points = 3

2 x work placements = 2 x 2 = 4

1 x short term school placement = 1 x 1 = 1

1 x educational visit to local school - within G20 area = 1 x 1 = 1

1 x annual participation in MHA volunteer days = 1 x 1 = 1

6 x Cash or in-kind support to MHA Community Fund (0.1% contract value per 5 points) = 6 x 5 points = 30 points

Total Points value selected = 40

Total cash value £150,000 x 0.1% = £150 x (40/5) = £1,200

Example 2 – £11m newbuild development contract lasting 15 months

Points total = 35

Essential Items:

2 x apprenticeships started or sustained = 2×4 points = 8

2 x jobs created taken up by new entrants = $2 \times 4 = 8$

4 x work placement (4 week) = $4 \times 2 = 8$

1 x short term school placement = $1 \times 1 = 1$

1 x Cash or in-kind support to MHA Community Fund (0.1% contract value per 5 points) = $1 \times 5 = 5$

Total essential points = 30

Selection from remaining items for balance of 5 points:

2 x work placements = $2 \times 2 = 4$

1 x educational visit to local school - within G20 area = $1 \times 1 = 1$

Total remaining points selected = 5

Total Points value selected = 35

Total cash value £11,000,000 x 0.1% = £11,000 x (35/5) = £77,000

Appendix B

Community Benefits Procedure

This procedure outlines the steps required at each stage in the management of community benefits clauses within contracts with suppliers.

This procedure also makes clear who is responsible for what actions throughout the process.

Step 1 – Identifying that Community Benefits Apply

The staff member responsible for the procurement of the contract will identify through completion of the Procurement Toolkit and the Community Benefit Template the overall community benefit value **estimated** at the start of the procurement process. At this point the staff member should complete the template, save a copy in the procurement file and also email to Community Regeneration Manager to flag the **estimated** value.

Step 2 – Including Community Benefit Clause in the contract documentation

The staff member responsible for the contract procurement must ensure that the brief or tender documentation issued includes details of the Association's community benefits requirements. The template clause is saved in the procurement toolkit template forms folder on the F drive here [..\..\Procurement Toolkit\Template Forms\COMMUNITY BENEFITS CLAUSE.docx](#) and that the supplier is also provided with a copy of the Procurement & Community Benefits Policy as part of any tender, contract or appointment letter.

Step 3 – Confirming the Community Benefit Overall Value

Once the successful contractor has been identified, the staff member responsible for the contract procurement will complete a new Community Benefit Template showing the **actual** community benefit value as per the final contract price and duration. The staff member should complete the template, save a copy in the procurement file and email to Community Regeneration Manager to flag the **actual** value and who the successful contractor is. The template will show what are essential deliverables and flag the negotiables which are still to be agreed through discussion in Step 4.

Step 4 – Agreeing the Details of the Community Benefits to be delivered

The Community Regeneration Manager will maintain a list of potential projects which could be used in contract negotiations with a developer/contractor. The projects will be graded in terms of priority. The list of projects will go to the Community Fund Panel on at least an annual basis for approval. The staff member responsible for the contract procurement may also have identified an environmental improvement project within the local area of the contract delivery, e.g., around a newbuild development. Where a local environmental improvement project is identified, and approved by the relevant Director, this will take priority over the general list of potential projects.

The staff member responsible for the contract procurement should invite the Community Regeneration Manager to the pre contract award meeting with the contractor. This will allow discussion with the contractor of the negotiable elements of the community benefits and agreement on any projects will be delivered.

The staff member responsible for the contract procurement should now finalise the Community Benefit Template, retain this on file for contract management purposes and issue to the supplier and the Community Regeneration Manager.

The Community Regeneration Manager will then either meet the link within the company providing the service or to obtain contact details of the appropriate person who is involved in community benefits.

Step 5 – Invoicing the Contractor for the Community Benefits

The Community Regeneration Manager will now issue a request to the finance team for a community benefit invoice to be raised. The invoice will reflect the full value of the community benefits agreed, any non-cash elements will be dated as payable at the end of contract period, any cash contribution will be payable on the date agreed with the contractor at step 4. The invoice will include a breakdown of the elements which make up the community benefits value as per the final template.

Finance will issue the invoice to the contractor and will maintain a sales ledger database and carry out monthly reconciliations. These monthly reconciliations will be discussed with the Community Regeneration Manager and the budget holder meeting.

Step 6 - Contract Management Meetings

The person who is managing the contract will be responsible for ensuring that delivery of community benefits is a standing item on the monthly contract management meetings. They should obtain details of any non-cash community benefits delivered to date e.g., apprentice hours, and provide these to the Community Regeneration Manager.

Step 7 – Crediting the Community Benefits Delivered

The Community Regeneration Manager will advise the finance team monthly of any non-cash community benefits delivered by each contractor. The finance team will raise a credit note to that value and match this against the original invoice and keep a record of the remaining outstanding balance reconciled monthly.

Step 8 – Managing Delivery of the Community Benefits

The Community Regeneration Manager will oversee the projects being delivered and flag any cause for concern with both the staff member undertaking the contract management role and directly with the community benefits liaison person at the contractor.

The Community Regeneration Manager will draw up a brief monthly progress report setting out progress in relation to the delivery of community benefits and highlighting

any issues and what steps are being taken to address these and provide this to Director of Resources.

Step 9 – Monitoring of Community Benefits

The Director of Resources will report quarterly to the SMT on community benefits secured through procurement activity in year and on community benefits delivered to date.

Step 10 – Process at End of Contract

At the end of the contract, the person who is managing the contract will be responsible for confirming with the contractor the final position on community benefits delivered, or if undelivered where reasonable attempts to deliver can be evidenced and advising the Community Regeneration Manager. Where the community benefits evidenced are less than originally agreed, Finance will request payment from the contractor of any outstanding balance on the community benefits invoice.