

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 financial policy, it forms a core part of the "financial framework" (Financial Regulations, ~~Financial~~ policies and financial systems).

This Policy applies to all purchases of goods, services and works by the University and its

line with the University's Off Payroll Working Policy. This is facilitated by the University's

The University is funded predominantly from public sources or tuition fees paid by students and must ensure that all funds (whatever the source) are used appropriately and that justification for any expenditure can be clearly evidenced in the event of a request for information from students, funders, government or members of the public.

Any purchase that

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.

The University is committed to sustainable procurement. A number of sections of this policy and associated practice have specific Sustainability considerations included as an integral part of the process. These are identified throughout by this symbol:



Purchasing decisions have major socio-economic and environmental implications locally, nationally and globally, now and for generations to come. The University aims to ensure that its activities meet the diverse needs of students, staff, the economy and society. Procurement and Commercial Services are developing a comprehensive set of targets to support the University's overarching strategy.

Staff involved in the procurement of goods, services and works throughout the University must consider appropriate environmental, social and economic factors in their purchasing decisions.

Our sustainable procurement goals will ensure that:

sustainability and social impact are integrated into all procurement processes

Further information on the University's wider sustainability work can be found here:
<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 it is not possible to consider the full spectrum of all individuals' specific 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

Procurement and Commercial Services must be engaged at the earliest planning stages for any requirement that may exceed £25,000 (including VAT).

Heads of Schools and Directors of Professional Service are responsible for compliance with this Policy in their areas, and for ensuring that those acting under this Policy (for whom they have management or contractual responsibility) are appropriately trained and made aware of their obligations.

Directors of Professional Service maintain oversight of purchasing activity relating to their service area, regardless of the budget it relates to. In many cases, the professional service to which a purchase relates will need to provide authorisation prior to commitment to that purchase by the University.

Heads of School and Directors of Professional Service are responsible for ensuring goods, services and works are purchased within their defined budgets, and that this Policy is followed within their School or Division.

Heads of School and Directors of Professional Service are responsible for the oversight of contracts and their management within their areas of responsibility, unless other specific contract governance has been put in place.

Heads of School and Directors of Professional Service are responsible for the purchasing arrangements in a School or Division and will recommend the appropriate access to the finance system for staff who undertake purchasing, and the distribution and use of purchasing cards.

All Budget approvers are required under the University's Financial Regulations to comply with its policies and procedures regarding the authorisation of expenditure.

Budget approvers must ensure sufficient funds are available before committing the University to any expenditure for goods, services and works.

Budget approvers must ensure that purchases of goods, services and works meet the VFM criteria detailed previously.

Budget approvers are Heads of School, Directors of Professional Service and any other individual acting under delegated authority to authorise expenditure from a Head of School or Director of Professional Service.

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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 86a

In order to support financial and budgetary control, contractual compliance and the delivery of VFM the

It is therefore essential that no orders are placed with a supplier that will result in an invoice being submitted until there is an approved purchase order in place.

The purchase order is the primary way of confirming a requirement to the supplier and ensures that the University is protected by its own terms and conditions. It should contain all necessary information to ensure that the supplier can fulfil the requirement in terms of type, quantity, quality, location and price of the goods services or works being purchased.

It is essential for the supplier to receive full details of the purchase order to ensure that they can fully meet the University's requirements, and that subsequent invoices can be matched to and paid against them.

Adherence to the purchase order process enables the user to meet all of the University's financial control requirements and also supports them in delivering VFM as set out below.

With respect to financial and budgetary control, the use of purchase ordering ensures:

- up front Budget approver authorisation before a commitment is made
- segregation of duties and audit trail
- immediate and accurate recording of a commitment and the type of expenditure
- real time tracking of transaction status.

With respect to VFM, the use of purchase ordering ensures:

- suppliers engaged have successfully passed due diligence checks
- University terms and conditions are in place guaranteeing the most advantageous terms for the University and protecting it from potential liability
- shared and documented understanding of the goods or services being purchased
- a documented check over quality received before payment is made
- access to e-marketplace and frameworks, where VFM judgements can be made to purchase the most appropriate goods, services and works from an increasing number of suppliers.

The University's policy is that a University purchasing card should be used when:

- a supplier is not set up on the University finance system and the purchase is below £5,000 (including VAT)
- a supplier only accepts card payments either on-line, by telephone or in person

services are being purchased from the University's managed travel provider, in order to secure the price on offer
the individual does not have access to the University finance system at the point when the purchase is needed
facilitating travel and working away from base
considering out of pocket expenses or a cash advance as an appropriate purchasing method

A Purchasing Card should never be used if the payment relates in any way to Off Payroll Working.

Purchasing cards should be used in preference to out of pocket expenses where access to both alternatives exists. Whilst they are intended to provide a quick and easy access to purchasing it is important that, wherever possible, staff and Budget approvers take a planned approach to purchasing and

It should however be noted that when purchasing 'off system', supplier terms and conditions will apply in most situations and the member of staff concerned will usually be responsible for due diligence around the supplier, including the VFM they offer.

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

the University's rules on gifts and hospitality as set out in the University's Financial

Regulations and Anti-Bribery Policy.

Members of staff who are engaged in purchasing decisions through their participation in tender evaluation or other processes leading to the purchase of goods, services and works must declare any conflicting interest that may influence or be perceived as having the potential to influence that person's ability to act impartially within the process. Any person declaring such an interest must not participate in or seek to influence any decision relating to the matter concerned.

Further details can be found in the Financial Regulations.

Under the Act, the University is committed to ensuring there are no instances of modern slavery, human trafficking, forced and bonded labour and labour rights violations in its supply chains, and that the following principles are adhered to:

- employment is freely chosen
- freedom of association and the right to collective bargaining are respected
- working conditions are safe and hygienic
- child labour shall not be used
- living wages are paid
- working hours are not excessive
- no discrimination is practiced
- regular employment is provided
- no harsh or inhumane treatment is allowed.

The University's modern slavery statement can be found at <https://www.sussex.ac.uk/about/strategy-and-funding/corporate-information>

Under the Financial Regulations, unless authorised by the Director of Finance, transactions are not permitted with any individual or organisation that is the subject of sanctions, embargoes or restrictions imposed by the United Nations Security Council, European Union, UK Government or any other government or organisation with whom the University is required to comply by virtue of a contractual or regulatory obligation.

An individual or organisation may be the subject of sanctions, embargoes or restrictions by express inclusion on a published list or by association with another individual or organisation appearing on a published list. Individuals and organisations may be the subject of sanctions, embargoes or restrictions because they originate from, operate in or have association with a particular industry, regime, and country or otherwise defined geography appearing on a published list.

The inclusion of terms in a contract that bind the University to apply sanctions imposed by any other authority than the United Nations, European Union or the United Kingdom Government must be authorised by the Director of Finance in advance.

If there is any possibility that an existing or potential supplier may be subject to sanctions, or whether a contract term imposes an obligation to apply sanctions, Procurement and

Commercial Services must be contacted immediately.

Information on sanctions can be found on the Finance website.

Policy title:	Procurement and Purchasing Policy
Date approved:	
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Related internal policies, procedures, guidance:	Financial Regulations Anti-Bribery Counter-Fraud Modern Slavery Off Payroll Working Policy