



**Affordable homes.
Exceptional care.**

Trust Housing Association Limited

**Annual Procurement Report
April 2024 to March 2025**

Published:	June 2025
Lead Officer:	Procurement Manager
Approved:	Director of Finance and People

Contents

1. Introduction	Page 3
2. Procurement Strategy (2024-2027) with Year 1 Update	Page 3
3. Scotland Excel Continuous Improvement Programme (CIPP)	Page 5
4. Regulated Procurement Compliance with General Duties	Page 5
5. Summary of Regulated Procurements Completed	Page 6
6. Community Benefits Summary	Page 7
7. Supported Business Summary	Page 8
8. Future Regulated Procurements Summary	Page 9
9. Annual Procurement Report Responsible Officers	Page 9
10. Regulated Procurements April 2024 to March 2025	Page 10
11. Future Regulated Procurements April 2025 to March 2027	Page 11

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 fourth Annual Procurement report produced by Trust Housing Association ("Trust").
- 1.2 Trust 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 totalling 3,847 properties. In addition, we provide some mid-market homes (56 units) and shared ownership homes (29 units). We also act as a property manager for homeowners and sharing owners in areas where we have an interest (382 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 2024 to 31 March 2025 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 (2024-2027) with Year 1 Update

- 2.1 A dedicated Procurement Team is established within the Finance and People Directorate which provides a centralised procurement function servicing the whole organisation. The team currently 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 Following successful delivery of the initial strategy, which effectively introduced and embedded the central procurement function, a new **Procurement Strategy** for the period **2024-2027** was developed to expand upon these efforts and set out the Procurement Team's new key objectives and priorities.
- 2.3 The strategy aims to ensure compliance and continual improvement while working towards added value, performance enhancements and savings from suppliers in the delivery of goods, services and works. **Empowerment and delegation** of procurement activity to Trust colleagues, either to support regulated procurements or manage their own low-risk, low value exercises, was a key theme throughout the strategy.
- 2.4 The following **8 Key Strategic Priorities** were identified as opportunities to improve and enhance procurement activity at Trust.
 - Contract & Supplier Management Framework
 - Regulated Spend Review with Savings and Contract Opportunities
 - Tendering for Capital Works

- Community Benefits Strategy
- Procurement Requirement Form and Pre-Market Engagement
- Consultancy Spend Review
- New Supplier Process
- Business Continuity Planning

3 Scotland Excel Continuous Improvement Programme (CIPP)

- 3.1 Trust participated in Scotland Excel's **Continuous Improvement Programme for Procurement** within the 2024/25 period, which assesses procurement representation and influence around the organisation to ensure fundamental aspects of legislation and guidance are being effectively implemented. The assessment was conducted by Stephen Brannagan, Director of Customer & Business Services and Sharon Christie, Commercial & Projects Manager from Scotland Excel.
- 3.2 Trust received a score of **23.5 out of 42** with an overall percentage of **56%**. This was deemed a very successful outcome in comparison to the sector average of 47% on the first programme of assessments. The following areas of strength were identified:
- Trust recognises the **Importance of Procurement** with investment in resources, policies, strategies and training
 - Creation of a **Procurement Network** via the "Procurement User Group" for sharing information
 - Strong understanding of **Corporate Spend** and review to identify non-compliance
 - **Contract and Supplier Management Policy** in place with training provided to contract managers
 - Strong **Contract Register** and **Project Planner**
 - Strong performance of **Agency Staff Suppliers** with significant savings and compliant contracts
 - Review of **Food Procurement** underway with future opportunities for savings and compliant contracts.
- 3.3 The assessment was also used to develop an action plan of recommendations to strengthen best practice across the organisation. The following areas of improvement were identified:
- Consideration to include Procurement and Contract Management in **Internal Audits**
 - Use of Scottish Government's **Procurement Competency Framework** to self-assess procurement professionals
 - **Negotiation and Commercial Training** for the Procurement Team and wider colleagues
 - Creation of a **Procurement Champions** group of **10-12** key budget holders and contract managers
 - **Networking Opportunities** with similar housing associations and wider public sector organisations
 - Use of the Flexible Framework tool to assess and recommend improvements for **Sustainable Procurement**.
- 3.4 Overall the assessment provided Trust with strong feedback on performance of the procurement function and an in-depth review of practices and processes. A summary report, including a detailed overview of the work currently underway and future planned activities, has been presented to the Trust Leadership Team. Delivery of these recommendations will compliment and further enhance the existing 2024-2027 Procurement Strategy.

4 Regulated Procurement Compliance with General Duties

- 4.1 Trust undertakes a detailed and systematic process for all regulated procurement activities, ensuring the procurement values of **fairness, equality and transparency** are upheld. Every care is taken to ensure that contracts are awarded to suppliers who are capable, reliable, provide value for money, and who can demonstrate that they meet high ethical standards and values.
- 4.2 The main features of Trust's competitive procurement processes in line with government guidance are described below:
- Public notification of bidding opportunities on Public Contracts Scotland portal
 - Clear description of the requirement for goods, services and/or works by way of technical specifications, address lists, asset registers, etc.
 - Clear description of performance requirements by way of key performance indicators, contract conditions, performance monitoring, etc.
 - Invitation to Tender documents which outline the contracting process, terms and conditions, criteria for evaluating bids and awarding the contract, etc.
 - Impartial evaluation and comparison of bids by competent evaluators without interference by bidders or other parties
 - Award of contract to the bidder who meets all contract requirements and offers the most economical and advantageous tender, as defined by the published selection criteria
 - Publication of contract award decision and notification to unsuccessful bidders with the ground for decisions and relevant feedback on their tender submission
 - Effective supervision of contract implementation
- 4.3 Where appropriate, Trust also makes use of collaborative contracts from external framework providers to implement contracts via direct award or mini competition. These contracts can support Trust to deliver improved contract terms, support contract and supplier management, provide community benefits and meet with sustainable procurement outcomes. They provide an efficient and compliant route to market which can reduce requirements to input time and resource. Overall they present opportunities to add value for money and are always considered as routes to market where available.
- 4.4 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
 - Procurement for Housing
 - Scotland Excel
 - Kent Council Services
 - Fusion 21
 - Northern Procurement Consortium
- 4.5 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 2024/25.
- 4.6 Contract and Supplier Management policies and procedures were developed and formally implemented in October 2024. These stipulated new governing principals for Trust and provided colleagues with a standardised step-by-step approach to contract management. The

documents included templates for contract management planning, performance review meetings and risk registers. Tailored training was provided by the Scotland Excel Academy to managers of high value, high risk contracts which provided further expansion on the guidance and gave colleagues an opportunity to share examples and best practice. Feedback from the session fed into final review and completion.

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

5 Summary of Regulated Procurements Completed

- 5.1 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 10**. This information, coupled with publication of the Contracts Register on Public Contracts Scotland, provides visibility of Trusts procurement activity over the reporting period.
- 5.2 Between 1st April 2024 and 31st March 2025 Trust spent approximately **£25.6m incl. VAT in Total Purchases** of goods, services and works from external providers. This is in comparison with £24.9m in 2023/24. The spend per supplier is reported on a monthly spend analysis sheet and periodically shared with key stakeholders around the business.
- 5.3 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 **£4,040,000** (ex. VAT)

There were **5** such procurements completed

PRA Regulated Procurements

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

Total Value of Procurements **£3,441,000** (ex. VAT)

There were **9** such procurements completed

**Works Contracts of considerable value, but under the regulated value of £2million, have been included in the list*

- 5.4 Within the period, the **Trust has saved £152k** (ex VAT) from various commercial activities, including challenging cost proposals, counter-negotiating cost increases and requesting further discount from leading tenderers. Notable savings include:
- £80k cost avoidance in the renewal of the building insurance policy, following a revaluation exercise to correctly value properties.
 - £23k saving on the purchase of cleaning products, following a price review and inception of a new contract
 - £12k saving from a new provider of telecare monitoring services, following a tender exercise
 - £11k cost avoidance from agency staff suppliers, following annual review and challenge of initial price proposals

6 Community Benefits Summary

- 6.1 The Public Contracts (Scotland) Regulations state for every procurement over **£4m**, organisations must consider how we can improve the economic, social, or environmental wellbeing of the local area through inclusion of community benefit clauses. The purpose is to assist with achieving sustainability in contracts activity, including targeted recruitment and training, small business and social enterprise development and community engagement
- 6.2 In early 2023, Trust developed a **Community Benefits Statement** to be included in procurement exercises and appended to contract agreements of sufficient value (see 6.3). The statement details Trust's approach to Community Benefits, including the preferred types of activities and priority groups. A minimum requirements table was created for both goods / service contracts and construction works listing the mandatory activities to be undertaken based on value band thresholds.

- 6.3 Trust stipulates the provision of community benefits as a mandatory requirement for contracts lower than the £4m threshold currently required by Scottish legislation. Where appropriate, Trust includes community benefit requirements at the contract threshold values noted below, and often consider them for contracts below these thresholds where appropriate:

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

- 6.4 Trust's approach to identifying community benefits is carried out on an individual project basis. As part of the tendering process, bidders are asked to describe their approach to delivering community benefits through a scored quality question within the technical evaluation. Tenderers are also be encouraged to identify additional benefits, added value or opportunities that will deliver social value throughout the performance of the contract.
- 6.5 The specific community benefit activities to be achieved are then agreed and included within the final contract document. These are periodically discussed at contract and performance review meetings, with suppliers asked to describe and provide evidence of their efforts.
- 6.6 The following process is used to agree upon and carry out community benefits:
- **Expectation** and examples described within the Community Benefit Statement
 - **Proposal** from the tenderer at bid submission stage
 - **Agreement** and inclusion within the contract
 - **Monitoring** delivery throughout the life of the contract
- 6.7 The **Trust Customer Hardship Fund** was established in April 2023, offering support to customers facing financial difficulty. In this 2024/25 period the Hardship Fund was fully Trust funded with money allocated as part of the budgeting process. A total of **£69.7k** was paid out to **443 tenants** (93.5% in rent arrears credits and 6.5% in shopping vouchers). The average amount provided was **£157 per tenant**. In future years, suppliers will have the opportunity make contributions to the Hardship Fund to act as their contracted community benefit. Often the donation will be a percentage of the total contract value or a pre-agreed sum at the outset of the contract. Supplier donations to the Hardship Fund have already been received and allocated to the 2025/26 fund which will be reported upon next year.

6.8 Community benefits are currently included in the following active Trust contracts:

Contract Title	Supplier	Contract Value	Benefits Provided
Development of 48 Affordable Homes in Bellshill (Reema Road)	Wilson Development Ltd	£9,300,000	£50,000 donation to the Trust Hardship Fund
Responsive Repairs, Void & OOH - Central & West	Rodgers & Johnston Ltd	£7,000,000	Local apprenticeships, support with qualifications, community / school engagement, local supply chain development
Commercial Gas Servicing & Maintenance incl. WH	ECG Facilities Ltd	£2,365,000	Local apprenticeships, work placements, support with qualifications, local supply chain development
Telecare Monitoring and OOH Call Handling (ARC)	Bield Housing	£1,450,000	Work placements for under-represented groups, support with qualifications, community engagement, digital confidence for tenants
Domestic Gas Servicing & Maintenance	Saltire FM Ltd	£1,248,000	Local apprenticeships, work placements, support with qualifications, local supply chain development
Ambient & Frozen Food	William Yule & Sons Ltd	£1,100,000	Provision of chilled food truck to local food banks, donations to local charities
Responsive Repairs & Voids – East (Lot 1) (joint-Bield)	Response BMS Ltd	£950,000	Customer well-being initiatives, local apprenticeships, work placements, support with qualifications
Responsive Repairs & Voids – East (Lot 2) (joint-Bield)	QAPM Ltd	£800,000	Local apprenticeships, work placements for disadvantaged groups, support with qualifications, community / school engagement
ECO4 Retrofit Projects (Isle of Arran)	Green Home Systems	£800,000	£75,600 donation to the Trust Hardship Fund based on £300 per property at 252 properties
Kitchen & Bathroom Installations (Various Sites)	CCG Construction Ltd	£794,000	10 x £50 Love2Shop Vouchers, two for each development involved in the project
Grounds Maintenance Service (Lot 4) - Lanarkshire	Murray Landscapes	£595,000	Local apprenticeships, food bank donations
Smart Heating Control Installations (Various Sites)	Consilium Ltd	£488,000	15 x £100 Supermarket Vouchers, one for each development involved in the project
Provision of Cleaning Products	PHS Direct	£440,000	Apprenticeships, community volunteering, charitable donations
Electrical Installation Condition Reports (EICRs)	TreeGreen Ltd	£355,000	Local apprenticeships, donations of old lighting to local schools and charities, school visits, community projects, local supply chain development

7 Supported Business Summary

- 7.1 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.
- 7.2 Trust has appointed **1 Supported Business** within the period. **Scotland's Bravest Manufacturing Company** (subsidiary of Royal British Legion Industries) were appointed to produce and install corporate branded signage at Trust offices and all Later Living developments following the corporate rebrand. They were appointed via the ESPO Signs Framework at a total cost of £35.5k ex VAT (£15k for the signs and £20.5k for installation).

- 7.3 Scotland's Bravest provide employment to military veterans and others with disabilities, providing nationally recognised training and qualifications with ongoing development opportunities. Over **100 veterans** have benefitted from employment, volunteering, support or development opportunities since their inception and **80%** of their current team are veterans, veteran family members or have a disability.
- 7.4 In future periods, Trust is committed to seek opportunities to award contracts to supported businesses where possible. Framework Agreements will be actively explored including [Supported Factories and Businesses: Procurement Framework](#).

8 Future Regulated Procurements Summary

- 8.1 Collaboration is important to drive efficiency in the procurement process. **Framework Agreements** are always considered as an opportunity to benefit from external expertise and compliantly award contracts. **Joint Procurements** with other housing associations are also considered to increase property portfolios and contract coverage, thus benefiting from economies of scale. Recently Trust has collaborated with Bield Housing for several Responsive Repairs contracts in central Scotland.
- 8.2 As part of the procurement strategy, **Tendering for Capital Works**, which have historically been direct awarded via Framework Agreements, has been identified as saving opportunity. Time, resource and consultant input will be required to develop the tender. However external frameworks charge a levy of 2.5% of total contract value or more which would cover the additional input required to develop. While the levy is charged to the contractor, generally the fee will be passed on to Trust within the price proposal. Small to medium sized businesses not on framework agreements can also be included in the process, thus increasing competition and competitive bids. There is also the added benefit of learning and development of the Trust project team and bringing expertise and specialisms in-house. Tendering projects are currently underway for a Roof Replacement at the Govan development in Glasgow and a Kitchens and Bathrooms framework providing multiple contractor options.
- 8.3 Another key priority of the procurement strategy was the **Spend Compliance Review**, undertaken to highlight maverick spend and supply categories not under contract. This was used to identify future regulated procurements and schedule them into the procurement project planner. A summary of the planned regulated procurements for the period **April 2025 to March 2027** is provided in **Section 11**.

9 Annual Procurement Report Responsible Officers

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

The Procurement Manager & The Director of Finance & People
Trust Housing Association
12 New Mart Road
Edinburgh
EH14 1RL

pinbox@trustha.org.uk
0131 444 1200

10 Regulated Procurements April 2024 to March 2025

Contract Title	Contract Reference	Supplier Name	Contract Value (ex VAT)	Route to Market	Start Date	End Date
Travel & Accommodation Management	CS-24-154	Clarity Travel	£100,000	Framework Call-Off (CCS)	01/04/2024	31/03/2028
Commercial Gas Servicing incl. Water Hygiene	AS-23-091	ECG Facilities Ltd	£2,365,000	Framework Call-Off (Fusion)	01/04/2024	31/03/2029
Wifi & Broadband Connectivity	BD-23-130	Social Telecom	£200,000	Framework Call-Off (PFH)	01/04/2024	31/03/2027
Internal Audit Services	FP-23-128	TIAA	£54,000	Trust Contract	01/04/2024	31/03/2029
Stock Condition Surveys	AS-24-153	JMP Consultants	£142,000	Trust Contract	01/05/2024	30/04/2027
Provision of Cleaning Products & Services	CE-23-121	PHS Direct	£440,000	Framework Call-Off (SXL)	01/05/2024	30/04/2028
Commercial Laundry Equipment Servicing	AS-23-106	Thain Commercial Ltd	£500,000	Trust Contract	01/05/2024	30/04/2028
Medical Adaptations & Bathrooms (Framework)	AS-22-071	Various	£880,000	Trust Contract	01/05/2024	30/04/2028
Kitchen & Bathroom Installations (Various Sites)	AS-23-141	CCG Construction Ltd	£794,000	Framework Call-Off (PFH)	15/05/2024	31/03/2025
ECO4 Retrofit Projects (Isle of Arran)	AS-23-137	Green Home Systems	£800,000	Framework Call-Off (SXL)	01/06/2024	31/12/2025
Smart Heating Control Installations (Various Sites)	AS-23-144	Consilium Ltd	£488,000	Framework Call-Off (PFH)	01/07/2024	31/12/2024
Water Hygiene & Legionella Treatment Works	AS-24-160	ECG Facilities Ltd	£420,000	Framework Call-Off (PFH)	01/08/2024	31/03/2026
Microsoft 365 Licence Agreement	BD-24-166	Phoenix Software	£247,000	Framework Call-Off (KCS)	01/08/2024	31/07/2027
MFD Printers at Developments	BD-24-162	XMA Ltd	£51,000	Framework Call-Off (CCS)	01/12/2024	30/11/2029
TOTAL REGULATED SPEND 2024/25			£7,481,000			

11 Future Regulated Procurements April 2025 to March 2027

Contract Title	Financial Year	Route to Market	Estimated Contract Value (ex. VAT)	Estimated Start Date	Proposed Duration
ECO4 Retrofit Projects (Various Sites)	2025/26	Framework Call-Off	£1,300,000	01/04/2025	1 Year
Responsive Repairs, Voids & OOH - East (Lot 1)	2025/26	Joint Tender (Bield HA)	£950,000	01/04/2025	4 years
Responsive Repairs, Voids & OOH - East (Lot 2)	2025/26	Joint Tender (Bield HA)	£800,000	01/04/2025	4 years
Telecare Monitoring and OOH Call Handling (ARC)	2025/26	Open Tender	£1,500,000	01/04/2025	10 years
Electrical Installation Condition Reports (EICRs)	2025/26	Open Tender	£350,000	01/04/2025	4 years
Fire Systems Servicing and Maintenance	2025/26	Open Tender	£325,000	01/08/2025	4 years
Window & Door Replacements	2025/26	Framework Call-Off	£1,100,000	01/09/2025	3 years
Main Office Landlines	2025/26	Framework Call-Off	£50,000	01/10/2025	3 years
Winter Maintenance Gritting	2025/26	Framework Call-Off	£440,000	01/11/2025	4 years
Roof Replacement Works (Govan, Glasgow)	2025/26	Restricted Tender	£800,000	01/11/2025	6 months
Painting & Decoration (Trust Developments)	2025/26	Framework Call-Off	£140,000	01/02/2026	4 years
Painting & Decoration (Wishaw Properties)	2025/26	Framework Call-Off	£140,000	01/02/2026	4 years
Catering Equipment Servicing & Repair	2025/26	Framework Mini Comp	£160,000	01/03/2026	4 years
Asbestos Surveys	2025/26	Open Tender	£80,000	01/03/2026	4 years
Catering Equipment	2025/26	Framework Call-Off	£140,000	01/03/2026	4 years
Commercial Catering Equipment Servicing	2025/26	Open Tender	£120,000	01/03/2026	4 years
Fire & Electrical Compliance Services	2025/26	Open Tender	£180,000	01/03/2026	4 years
Personal Protective Equipment (PPE)	2025/26	Framework Call-Off	£60,000	01/03/2026	4 years
Kitchen & Bathroom Installations (Framework)	2026/27	Restricted Tender	TBA	01/04/2026	4 years
Food Produce (Central Belt Framework)	2026/27	Open Tender	£400,000	01/06/2026	4 years
Food Ambient & Frozen	2026/27	Framework Call-Off	£600,000	01/09/2026	4 years
Gutter Cleaning and Minor Roof Repairs	2026/27	Restricted Tender	£480,000	01/09/2026	4 years
Window Cleaning	2026/27	Open Tender	£250,000	01/10/2026	4 years
BT Superfast Broadband	2026/27	Framework Agreement	£70,000	01/10/2026	3 years
Legal Services (excluding Employment Law)	2026/27	Open Tender	£150,000	01/03/2027	4 years

published by
Procurement Service, Directorate of Finance & People
June 2025

Trust Housing Association Limited
12 New Mart Road
Edinburgh
EH14 1RL

www.trustha.org.uk

0131 444 1200

pinbox@trustha.org.uk

Registered Scottish Charity No. SC009086