

Purchasing Policy



The role of the purchasing policy is to define standard methods and procedures for EFHL to purchase products and services from different suppliers.

1. Suppliers

Where possible purchases should be made from suppliers who have an existing relationship with EFHL. There are some key areas where there is a 'preferred supplier' relationship for the whole group and, wherever possible, relevant orders should always be placed with them. The main areas where this applies are;

Food	Creed
Kitchen equipment & maintenance	Aggora
Laundry equipment & maintenance	PDS Solutions
Catering, domestic & medical supplies	Countrywide
Carpet cleaning	Traffik
Pest control	Ecolab
Hoist equipment & maintenance	Arjo
Beds & overbed tables	Bakare
Paint & decorating supplies	Brewers
General building repairs	Screwfix
Lighting supplies, fittings & batteries	CEF
Lamps	Lyco

In addition, individual homes may have preferred suppliers for specific supplies outside of these areas.

You will need to seek approval from the Finance Director before setting up accounts with any new suppliers. You can do this by using the new supplier request form(available [here](#) on the intranet)

The company does have an Amazon Business account but this should only be used if the item(s) being purchased cannot be sourced from any other supplier. All orders placed on the Amazon Business account will be forwarded to the Finance Director for review and approval before being processed. Electrical items should not be purchased through the Amazon Business account.

In general, the company credit card should not be used for any purchasing good or services and approval should always be obtained from the Finance Director before doing so.

2. Ordering

All orders must be approved by the General Manager (GM) or Clinical Care Manager (CCM) with the exception of regular operational expenditure which can be managed by the relevant

Head of Department without the GM's or CCM's approval. The areas of regular operational expenditure are listed in the section - 'Authorisation Limits' below.

Heads of Department should complete an Order Request Form (available [here](#) on the intranet) when they have obtained a price for the item(s) or service(s) they wish to purchase. They should then take this form to the GM or CCM for authorisation. Once authorised, the order form should then be given to the Administrator so that they can use it to verify the invoice when it is received.

For all orders outside of regular operational expenditure and over £2,000 efforts should be made to obtain more than one quote. For all order over £5,000 at least three quotes should be obtained.

3. Authorisation Limits

In general, all purchase orders must be signed off by the GM or CCM (except for those listed below).

There are certain items of routine operational expenditure, listed below, which can be managed and purchased by the relevant Head of Department without the GM's or CCM's approval. However, the Head of Department will have responsibility for staying within budget for these items of expenditure:

- **Food**: Can be managed by the Hotel Services Manager or Catering Manager. This should be done within budgetary constraints and should be monitored by the GM both at the time of approving invoices and monthly through the Management Accounts. Controls are in place at the point of ordering (only approved product lines can be ordered)
- **Medical Supplies/pads**: There are controls put in place at the point of ordering for the management of these orders. This should be done within budgetary constraints and should be monitored by the GM both at the time of approving invoices and monthly through the Management Accounts. Please note that on all invoices where there is the need to split the 'Total Cost' for medical supplies and pads in to different budget lines then you will also need to split the VAT.
- **Chemicals/disposables**: There are controls put in place at the point of ordering for the management of these orders. This should be done within budgetary constraints and should be monitored by the GM both at the time of approving invoices and monthly through the Management Accounts. Please note that on all invoices where there is the need to split the 'Total Cost' for chemicals and disposables in to different budget lines then you will also need to split the VAT.
- **Stationery**: This can be managed by the Administrator/Administration Assistant. This should be done within budgetary constraints and should be monitored by the GM both at the time of approving invoices and monthly through the Management Accounts. For any order over £100 authorisation should be sought from the GM before confirming.
- **Maintenance**: This will be managed by the Maintenance Manager. This should be done within budgetary constraints and should be monitored by the GM both at the time of approving invoices and monthly through the Management Accounts. For any

order over £200 or not from a preferred supplier authorisation should be sought by using the Order Request Form ('Equipment' tab) available from the [intranet](#).

- **Training:** This will be managed by the CTC. Any non-mandatory training will need to be authorised before booking. The Order Request Form ('Order' tab) should be used in order to obtain the necessary authorisation, this is available from the [intranet](#).
- **Marketing:** Any marketing expenditure should be requested using the Order Request Form ('Order' tab) which is available from the [intranet](#).
- **Recruitment:** All recruitment expenditure should be requested using the Order Request Form ('Order' tab) which is available from the [intranet](#).

4. Authority Levels

The rules for approval of orders, outside of those detailed in Section 1, are shown in the tables below;

In budget, up to £500	GM
Outside of budget, up to £100	GM
In budget, up to £1,000	RM
Outside of budget, up to £500	RM
Up to £10,000	Finance Director
Over £10,000	Chief Executive
Use the Order Request Form available on the Intranet	

Nurse & Care Assistant Agency	RM
Use the Weekly Agency Authorisation Form available on the Intranet	

Catering Agency	RM
Use the Weekly Catering Agency Authorisation Form available on the Intranet	

Click [here](#) to open the Forms page on the intranet.

5. Deliveries

- A delivery note should be taken for all deliveries in to the building (timesheets and service sheets are forms of delivery notes). The person accepting the delivery must check the delivery is correct and then sign off the delivery note. This should then be passed on to the Administrator.
- The Administrator will then match the delivery note to the original order to make sure what has been delivered is as ordered and this should then be filed ready for when the invoice is received.

6. Authorisation of invoices

- Invoices received directly at the home should be scanned and emailed to purchaseledger@turn2us.org.uk.
- Invoices will be entered on to xledger (the accounting system) and will be available for online authorisation.

- Before authorising an invoice, it should be checked against the delivery order or job sheet to ensure that it is correct. Where there is no delivery order or job sheet the invoice should be checked with the relevant Head of Department to ensure that it is correct.
- Once the invoice has been approved on xledger it will be paid in line with the supplier's payment terms.