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NWSSP Procurement Services Best Practice

2026

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Objectives

- To understand Procurement **key objectives** and priorities
- To develop an understanding of **Procurement Regulations**
- Understand how these are applied within **the organisation and their application** through the SFIs
- To understand the various routes to contract
- Understand **Service Group responsibility**

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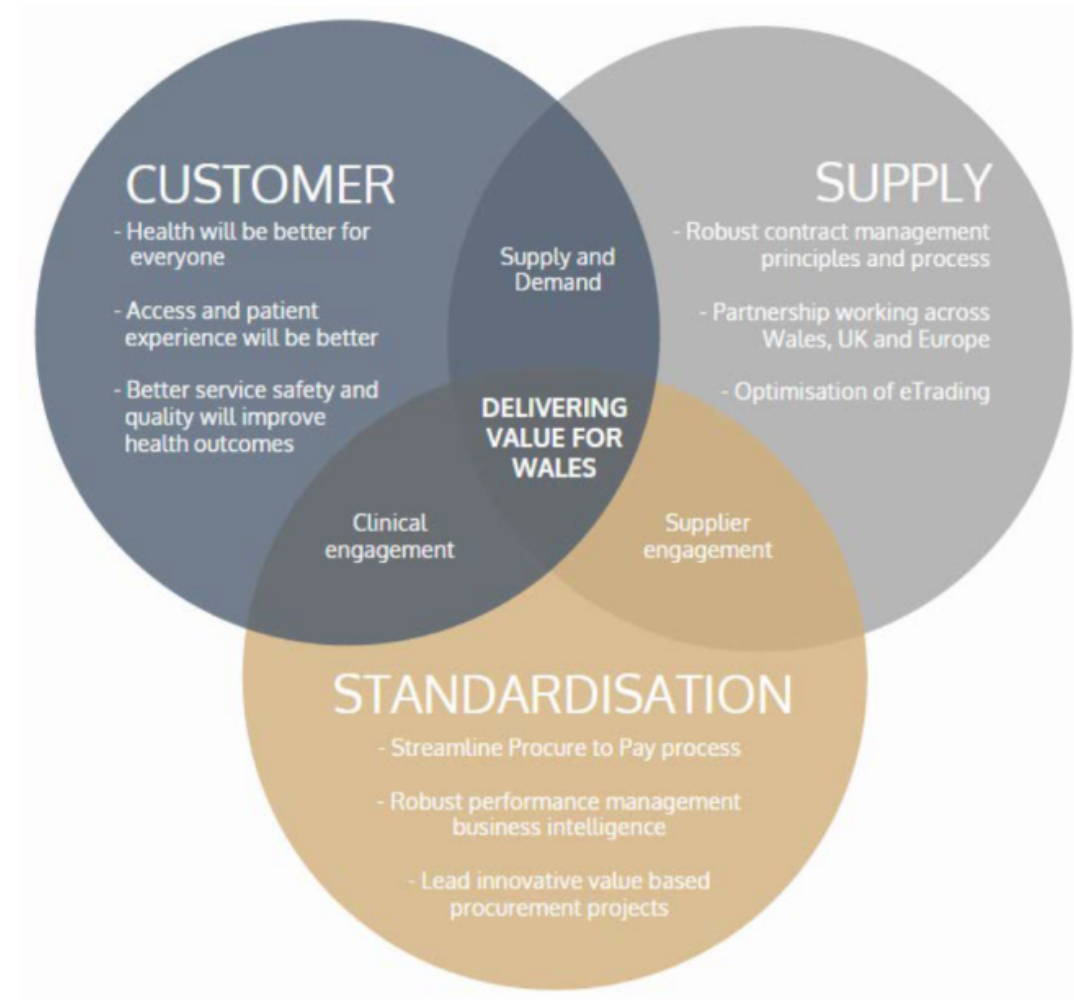
Procurement Objectives and Priorities

REGULATORY & GOVERNANCE

- Procurement Contract Regulations (PCR2015 / Procurement Act 2023 / Provider Selection Regime (Wales))
- Application of best practice procurement principles
- SFI's
- Welsh Government
- Central Government
- Audit

CUSTOMER FOCUS

- Safe, quality and efficient service focused on patient outcomes





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Frontline Commercial Procurement Team: How we Deliver

The local Procurement Team are visible and front-facing, responsible for the day to day engagement with all areas. Ensure key processes and procedures are in place to ensure the right quality, price, source, quantity and timing are achieved.

Local Procurement Business Managers are based within the HBs, Trusts and NWSSP. Their roles are to support the development and delivery of organisation's IMTPs, Savings Plans and the procurement of HB/Trust/NWSSPs requirements efficiently and compliantly.

BUSINESS AS USUAL

- Purchasing of goods and services
- Professional procurement advice
- Sourcing and contract renewals
- Invoice on hold
- Non-Catalogue reduction
- Deep dive expenditure review
- Savings opportunities and delivery
- Supply Chain and Stock Control Support
- Review of influenceable spend

ADDED VALUE SERVICES

- Patient pathway reviews
- Value based healthcare
- Process mapping and improvements
- Rationalisation and standardisation
- Professional supply chain support
- Strategic supplier negotiations
- Supplier performance management

Governance

Standing Financial Instructions (SFIs)

REGULATIONS	VALUE EXCL VAT	PROCUREMENT ROUTES		
Standing Financial Instructions	Under £5,000.00	Single Supplier (quote in writing) - At discretion of appropriate Director/Budget Holder		
	£5,000.00 to £24,999.00	Quotation exercise via Multi-quote system	Single Quotation Action Form in specific, exceptional circumstances	Mini Competition or Direct Award from National Framework
	£25,000.00 to the prevailing FTS threshold ¹	Competitive Non-FTS (previously Non OJEU) Tender	Single Tender Action in specific, exceptional circumstances	Mini Competition or Direct Award from National Framework
UK Public Contracts Regulations 2015/Procurement Act 2023	Over the prevailing FTS threshold ¹	Competitive FTS (previously OJEU) Tender	Transparency Notice (for single supplier justification)	Mini Competition or Direct Award from National Framework

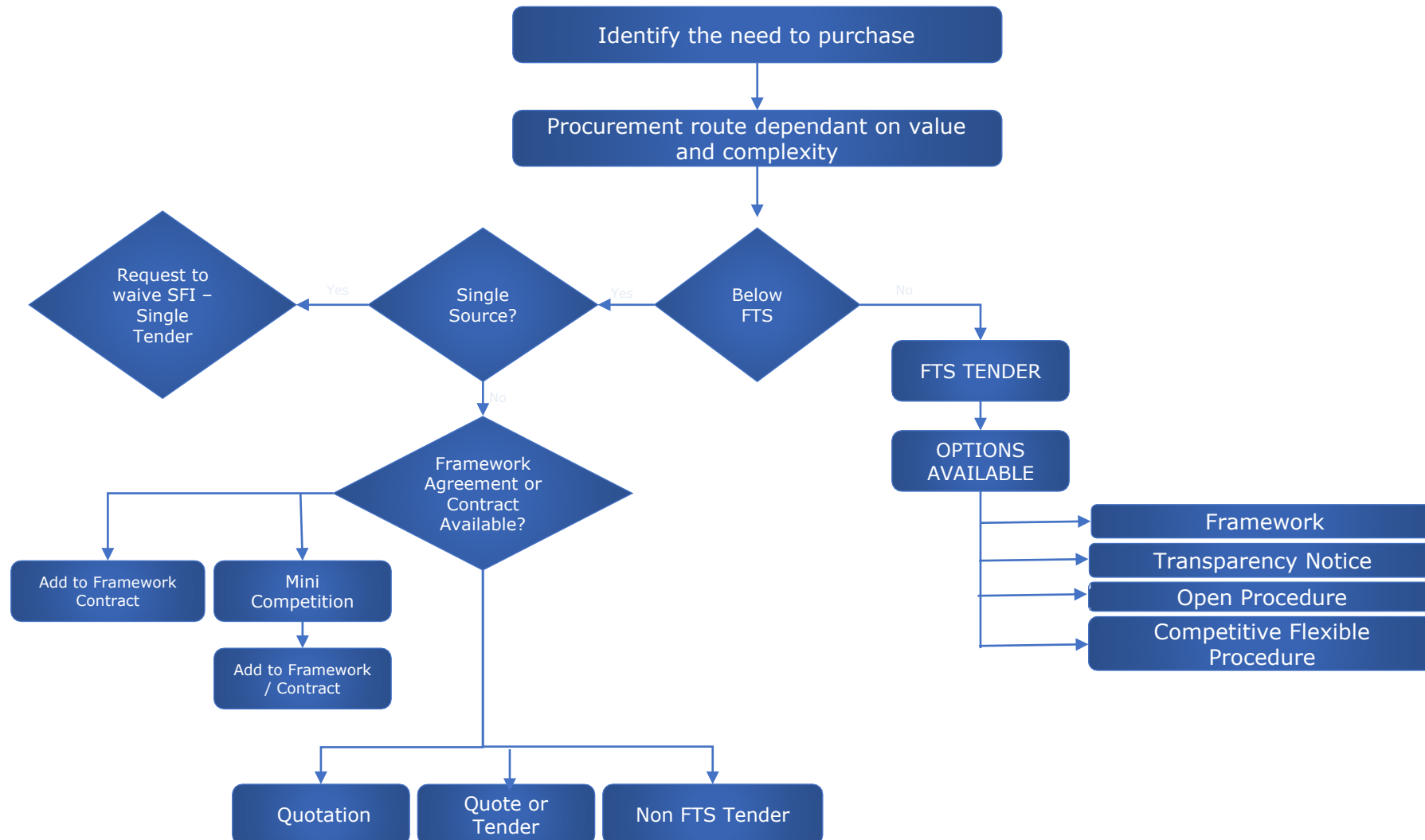
¹ Current FTS threshold amounts - Goods and Services - £135,018; Works £5,193,000; Light Tough Regime £663,540; Concession £5,193,000



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Procurement Flow Chart



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Spend control

1. What are Discretionary Spend Controls?

Discretionary Spend Controls are measures implemented across SBU HB to manage spending on non-essential goods and services. These controls aim to ensure financial stability and prioritise resources for essential patient care and critical operational needs.

2. Why are these controls being implemented?

The NHS faces significant financial pressures, and SBU HB is taking proactive steps to manage its resources responsibly. These controls help us achieve financial recovery targets, safeguard essential services, and promote a culture of financial awareness across the organisation.

3. How will these controls affect me?

If you requisition, purchase, or approve goods and services, you will need to follow the new procedures, this includes providing detailed justifications for requests, adhering to approval processes, and understanding break-glass exemption criteria.

4. Which categories are affected by these controls?

The controls currently apply to 10 categories shown adjacent. There will be a list of exclusions including critical items for patient safety and/or delivery of care

Category	Control Mechanism
Books, Journals & Subscriptions	Restricted Spend
Furniture & Fittings	Controlled Ordering
Office Equipment	Controlled Ordering
Stationery	Restricted Spend
Conference & Seminars	Restricted Spend
Training	Restricted Spend
Training Materials	Restricted Spend
Training Expenses	Restricted Spend
Room Hire	Restricted Spend
Travel & Subsistence	Restricted Spend



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Procurement Requirements



Engagement

Divisions

Budget Holder

Finance

Declarations of Interest



Specification

Key Performance Indicators

Timelines

Deliverables

Warranty

Maintenance Agreement



Evaluation Questions

Qualitative

Technical

Commercial

Social Value

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Specification

To ensure your specification is fit for purpose, procurement requires as much detail as possible. Contract management is easier to manage when the specification was thought through prior to procurement, this will ensure a tight and robust contract.

There is a standard specification template [Specification Template](#)

- You will need to gather all stakeholders to discuss what their requirements are
- Your specification will need to be signed off internally prior to procurement commencement
- Your procurement Officer/Manager will also be able to assist you
- You will need to consider how Contract Management will be conducted at this stage

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Specification Tips...

Background

- Input information of your Organisation, Division and the background of why your procuring

Requirements (and Outputs)

- Your scope of works (Tips.. Call outs, Response times, schedule of work, detail equipment, Reporting, parts and materials, warranty, hours of work)
- Outputs (outputs required, legislation, reporting, repair works and quotations, defects, condition survey, key contacts)

Service Levels and Performance

- Contract performance monitoring (detail when and who will attend)
- Key objectives (signing in and out, analysis, call out response)
- KPIs in full, with method of measurement

Pricing (if required)

- Invoicing
- Contract Term
- Exit strategy (Contract Exit/ Termination)



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Compliant Procurement Routes Considerations



Procurement Outcome Report



Minimum Timescales for
Tenders



Competition/Value for Money



Governance

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Procurement Regulation Principles and Implications

Principles

- **NON-DISCRIMINATORY** equal access for economic operators from all member states.
- **TRANSPARENCY** economic operators should know in advance what the applicable rules are and that there is an opportunity to tender.
- **MUTUAL RECOGNITION** of qualifications, standards etc.
- **EQUAL TREATMENT** same rules apply to everyone.
- **PROPORTIONALITY** measures taken by a contracting authority should be both necessary and appropriate.

Implications

- How we engage with the market
- When it is appropriate to negotiate
- The type of procedures we can utilise
- Minimum timescales for tender
- How we question our suppliers and at what stage of a procurement
- How we score our suppliers during a tender - the Award Criteria
- Standstill period post award



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Service Group Responsibility

- Engage with Procurement Services as soon as possible when a need is identified – consider IMTP requirements.
- Do not commission works to be done without a purchase order in place – in line with the All Wales No PO no Pay Policy.
- Ensure orders are receipted in Oracle to reduce IOH.
- Ensure that when requisitions are processed and approved within your delegation that funds are available for the requirement – consider whether it is funded by capital or revenue.
- Be aware of your responsibilities as budget holders including contract management.
- Be aware that any breaches of SFIs will be reported to Audit Committee.

Key Contacts: Paul Buckingham – Medical, Suzyann Pritchard – Non-Medical, Nicola Craven – PCS, MH & Commissioning



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Contract Management

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What is Contract Management?

Contract Management is the process of implementing and reviewing contracts

- For each organisation a policy under your SFIs has been developed following a recent audit of its contract management approach by NWSSP Audit & Assurance Services.
- All contracts with a total value greater than £100,000 (incl. VAT) are included under the procedure as well as any lower value strategic/business critical contracts that would benefit from proactive management.
- Procurement will contact the divisions as part of the contract planning stage to collect the names of the nominated Contract Managers on contracts that require managing.
- However, please feel free to reach out to Procurement too. Procurement will guide you on how to implement the new policy.



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Where to Start



Review your contracts
Register and create
column for RAG rating
and ensure contract
costs are included



If your contracts are over
£100k they will require
contract management



If contracts are under
£100k but classed as a
high-risk contract, we will
include contract
management.



The above is mandatory
but having 6 monthly or
annual contract meetings
with all your contractors
is good practice.

Put a column identifying
the plan and dates of the
next review meeting.

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Procurement Forms

- After your meeting, you must send procurement a copy of the below (Contract Performance Report and Contract Management Plan)
- Contract Management Plan will be one document for the entire contract.
- Contract Performance report will need to be completed for every review date.

[Contract Management Plan](#)

[Contract Performance Report](#)

[Contract Management Procedure](#)

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Any Questions?

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