

PROCUREMENT POLICY MANUAL



ADS-South Rift

To honour God and serve people



FOREWORD

ADS SR recognizes that procuring goods and services is key to achieving its mission and therefore the need to maintain honesty, integrity, and objectivity to achieve value for money.

The development of this Procurement policy was a team effort that benefitted from the time, commitment, expertise, and resources from many individuals from the ADS SR board and staff, NPI Expand team and the H.K Enterprises Kenya Consultants. The leadership of H.K Enterprises Kenya Consultants ably steered the development of this manual and in addition provided critical technical inputs.

We wish to acknowledge the generous support from USAID NPI EXPAND project who provided the financial and logistical resources that supported the entire process of developing this Strategy. We acknowledge and greatly appreciate the contribution of the NPI EXPAND technical team who provided invaluable inputs and guidance at all stages. Lastly, the enthusiastic participation and input from the committed team from ADS SR Board and staff members is recognized and sincerely appreciated.

Rt. Rev. Ernest Ngeno
BOARD CHAIRPERSON

Date _____

PREFACE

The purpose of this policy is to provide guidance in the procurement of services and good in an objective manner.

ADS South rift, the development arm of the ACK Diocese of Kericho, has made key strides since its registration in 2015. Key among them included development of various policy documents. As the organization reached the acceleration stage, it was important to revise/formulate this policy document to support its next stage of growth. This document was last revised in November 2023.

The manual takes cognizance of and is aligned with the ADS SR Finance policies, Assets management Policy.

The policy developed in consultations with key stakeholders in ADS SR, ACK Diocese of Kericho and in the region. We appreciate the informative input and feedback that culminated in the final policy. We retaliante our commitment to the spirit of collaboration and partnership that is critical to successful implementation of the manual and call upon all stakeholders to join us in this endeavor.

Date_____

Mary Naikumi

EXECUTIVE DIRECTOR

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1.0 EXECUTIVE SUMMARY

1.1 ABOUT US

Anglican Development Services (ADS) South Rift is the development arm of Anglican Church of Kenya Diocese of Kericho. It operates in Bomet, Kericho and Narok counties with a population of 3 million people in an area of 21,900 square kilometers. The organization has been working with both rural and urban communities in these three counties.

The organization has been in operation since 1983 as ACK Narok Integrated Development Program (ACK NIDP) and ACK Trans Mara Rural Development Program (ACK TRDP). To align with the expanded geographical coverage and scope, all the ACK programs in south rift consolidated and registered in 2015 as ADS South rift.

The organization has extensive experience in designing and implementing various projects through various community engagement processes such as Church and Community Mobilization (CCMP), Participatory Evaluation (PEP), Participatory Vulnerability Capacity Assessments (PVCA), Citizens Voice and action (CVA) and Community Based Adaptation (CBA) Approach. As a result, communities identify and prioritize their needs, opportunities and resources then take actions to address them integrating disaster risk reduction strategies.

Key strategic focus areas are in Health, Education, OVC care and support, Food security, Economic Empowerment, Water and Sanitation. The focus areas ensure that Gender, Disability, Peace building, Disaster risk reduction and Environment are integrated in all the programs interventions.

The organization has good structures and strong financial control systems. This has seen its local offices in Narok, Trans Mara and Kericho manage over KES 120 million in annually with excellent audit ratings. A very competent team of management and technical staff manages the program with clear organizational policies that ensure proper management of resources. The strong presence of the organization in the community has led to transformational development among the Target beneficiaries.

1.2 VISION

A sustainable organization honoring God and serving people to achieve a dignified living.”

1.3 MISSION STATEMENT

To transform society by empowering communities to holistically address their needs and glorify God.

1.4 CORE VALUES/PRINCIPLES

1. Faith In God
 2. Compassion
 3. Sustainability
 4. Stewardship
 5. Equity
 6. Teamwork
 7. Growth, Learning and Innovation
 8. Professionalism
 9. Organizational and Self-development.
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2.0 DEFINITIONS/BACKGROUND OF PROCUREMENT

2.1 PROCUREMENT

This is the process of sourcing, purchasing and acquiring goods and services for the organization. The process must be strictly ethical, competitive, open, and fair. Once the need has been communicated through an approved purchase request form, the procurement office then sources the items/materials and services by soliciting quotes from registered approved suppliers or the open market.

2.2 THE OBJECTIVES OF THIS PROCUREMENT POLICY

- To procure quality materials, goods and services economically from reliable source
- To ensure timely delivery of procured goods and services
- To ensure that goods and services procured have reasonable costs
- To continuously locate, evaluate and develop economical and reliable supply sources for ADS SR through an elaborate vendor pre-qualification and rating process
- To continuously appraise materials, and goods in line with industry trends
- To procure prudently in accordance with ADS SR policies/donor requirements
- To maintain proper inventory management system in line with the procurement plan
- To set up procurement procedures

2.3 PRINCIPLES OF A FAIR PROCUREMENT PROCESS

- **Fairness** - means the procurement process is free from preference, judgement, self-interest, and favoritism. We need to avoid conflict of interest, treat all bidders impartially and objectively, no bias in information disseminated and opportunity to participate to all suppliers and have clear criteria of suppliers' evaluation.
 - **Integrity** - There shall be no corruption or collusion with suppliers or other persons involved in a procurement project.
 - **Transparency** - Conduct procurement processes in a manner that allows for public scrutiny and provides equal access to information. Communicate decisions and outcomes to all participating bidders and stakeholders in a timely and transparent manner.
 - **Value for money**- Focuses on paying for the best quality services and goods. Value for money focuses on the offer that is the best combination of technical specifications,
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quality, and price. Factors considered include quality, experience, the supplier's reputation, life-cycle costs, benefits and parameters that measure how well the good or service allows the organization to meet its social, environmental or other objectives. In order to have the best value, it should:

3.0 PROCUREMENT COMMITTEE

A procurement committee is a committee within the organization with authority to undertake procurement in accordance with the policies set out within the organization.

At ADS SR, the committee will be used in an evaluation that is above KES 40,001.

The ADS SR procurement committee shall consist of;

- Program/Technical person
- Procurement officer/person – Ex-officio member of the committee
- Finance officer/person
- Executive director – The ED shall only sit in the procurement committee for purchases above Ksh 500,001.
- Person requesting for the goods or services

The committee formation approval shall be done by ED. In cases where the ED is a member of the committee, then the board chair shall approve the related. In most cases, the committees will be formed on case-to-case basis.

Where a committee is formed for a long period like annually, the committee shall be formed and chaired by a person nominated through members voting or consensus.

All the members shall be present in the procurement evaluation process and must sign the conflict-of-interest form by the end of the process.

Members of the committee must also sign the bids/quotations.

3.1 FUNCTIONS OF THE PROCUREMENT COMMITTEE

1. Review, verify and ascertain that all procurements are undertaken in accordance with the regulations and terms set out in the tender documents and the procurement policy,
 2. Approve the selection of successful tender or application proposals,
 3. Review the selection of procurement criteria.
 4. Review and evaluate suppliers to develop database for pre-qualified suppliers annually.
 5. Undertake site visits on supplier premises on need-by-need basis.
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6. Undertake any other functions and duties as shall be assigned from time to time by the Executive Director.

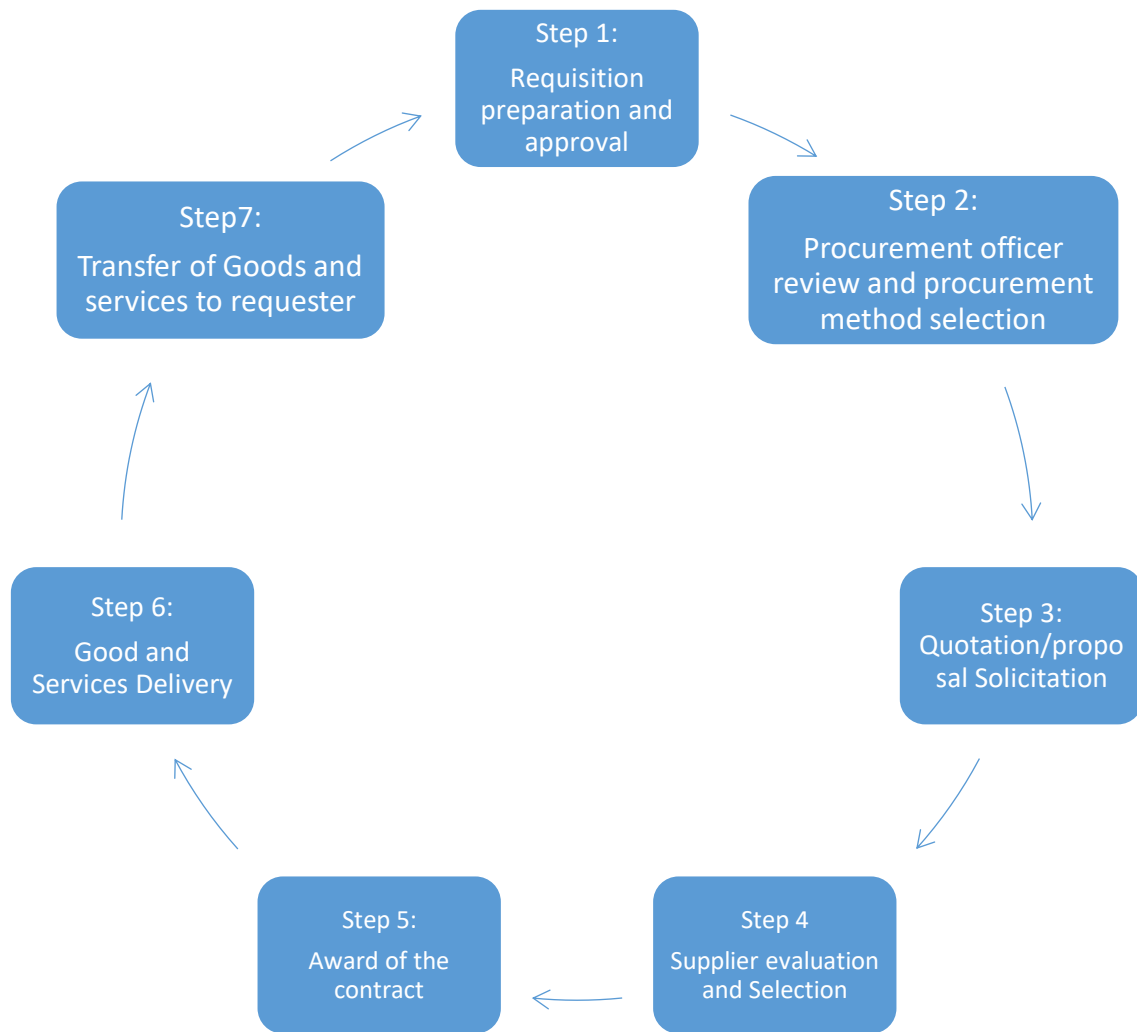
4.0 ADS SR PROCUREMENT THRESHOLDS, PROCEDURES AND FLOW

4.1 PROCUREMENT THRESHOLDS

Threshold	Competition requirements	solicitation method	Evaluation decision and team involved	Approval
Petty cash purchases	None	None	The costs must be within the market rates The items must be within the budget limits	Head of Finance and Administration
Below Ksh 40,000	Subject to two quotes	Both email and Oral quotations from two independent sources Social media	Selection based on lowest price. Formal evaluation plans, competitive range, discussions, and scoring are not required. Admin/procurement officer/person and Head of finance and Administration	Head of Finance and Administration
Ksh 40,001 – Ksh 500,000	Minimum of three quotes	Use of emails is highly encouraged but in some cases the drop of forms Social media	Best value = Lowest priced quote/offer with highest past performance rating. Procurement committee	Executive Director
Kes 500,001- KES 3,000,000	Closed tendering	Use of emails only	Best value = Lowest priced quote/offer with highest past performance rating. Other factors to be considered like budget	Executive Director

			and internal factors like delivery period. Procurement committee, Executive Director, or in some cases involvement of donor	
Above KES 3,000,000	Open Tendering	Use of emails only	Best value = Lowest priced quote/offer with highest past performance rating. Other factors to be considered like budget and internal factors like delivery period. Procurement committee, Executive Director, technical person involved or in some cases donor representative	Executive Director
Assets Purchase	Depending with the value will fall under 2 quotes or 3 quotes category	Both email and Oral quotations from two independent sources	If less than KES 40,000 then Procurement and head of Finance & Admin. If more than KES 40,001 then full committee If more than KES 500,001 then ED is involved. N/B: For the purchase of Assets, The board Chair or his appointed representative shall approve the minutes and bid analysis regardless of the amount involved	Board Chairperson or his appointed representative

4.2 PROCUREMENT FLOW CHART



4.2 ADS SR STAGES OF PROCUREMENT PROCESS

Stage 1: Requisition preparation and approval

The user department identifies the procurement needs and prepares the procurement request. The procurement requisition preparation and approval will follow the below procedure:

1. Identification of the procurement needs – The user department through project staff/administrative person shall identify the procurements needs with details of technical specifications, quantities, quality standards, and delivery timelines.
2. Preparation of the procurement requisition – The departmental (project staff/administrative) person shall raise the procurement requisition filling all the details indicated in step 1.
3. The immediate Supervisor shall then review the requisition to ascertain the need and that the procurement is in line with the budget line and activity plan among other necessary approval details.
4. The finance/accountant shall then check the requisition for budgetary constraints and compliance.
5. The requisition shall then be approved by the project manager for field activities or ED at Secretariat level.

Once approved, the requisition is sent to the procurement office.

Stage 2: Review and selection of procurement method

This is done by the Procurement officer/Person.

The procurement officer/person checks for completeness, accuracy and compliance with the policies and guidelines.

The procurement officer identifies the type supplier source for the procurement from the list of suppliers pre-qualified and/or open market.

Stage 3: Quotation solicitation

The procurement officer/person shall then send to suppliers a request for quotation/proposal. A minimum of 2 quotations is required for the procurement to be done in ADS SR as per the thresholds. The procurement officer/person shall receive quotations for the respective procurements.

The sourcing is done via emails or if in remote areas, use of the `pre-designed serialized standard forms.

Stage 4: Supplier Selection and Evaluation.

Purchases above Ksh 40,001 shall undergo the full procurement process where after the procurement officer/person has received the quotes, will subject them for committee evaluation.

Below Ksh 40,000 shall be processed by the procurement officer but the evaluation decision be decided by the head of Finance and Administration.

The Procurement Committee will then evaluate the procurements against the set requirements and will select the one that best meets the requirements as set out. The Procurement Committee will then write a report on their findings giving justification for their choice of supplier.

The procurement officer liaises with the procurement committee to prepare the Bid Analysis summary after summary report. This is after the committee has reviewed the available quotes and given a summary report. The Bid Analysis will be reviewed by the Head of Finance and Administration and be approved by the Executive Director. However, for procurements below KES 40,000, the Bid Analysis form will be approved by the person heading the Finance and Administration department.

The procurement committee carefully considers various criteria and employs specific methods to assess suppliers' qualifications, performance, and ability to meet requirements. Below outlines the criteria and methods used in supplier selection:

- Business registration documentations
 - Reliable supplier company profile
 - Best value in terms of monetary cost
 - The extent to which the goods or services meet the need
 - Past performance of vendor
 - Quality of services and supplies offered
 - Terms and conditions of payment
 - Compliance certificates
 - Relevant professional bodies certificates (where applicable like audits).
 - Possess technical expertise and resources
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This list is not exhaustive, and the management may add more qualification details.

Stage 5 Contracting and Issuance of Local Purchase order.

Approvals & Award: The Procurement officer/person shall prepare the purchase order or contract. All contracting documents and LPOs to be approved by the Executive Director. A fully counter-signed copy be filed by the procurement office.

Legally, verbal agreements are not enforceable and will therefore not be used.

Stage 6 Goods and services delivery

For office items, the goods shall be received by the administrator who shall sign the delivery note. The requesting person shall liaise with the procurement office to ensure follow-up and delivery goods and services.

For the consultancies, the program coordinator shall approve the completion certification.

5.0 PROCUREMENT METHODS

5.1 OPEN TENDERING.

This method is used for high-value and complex procurements. It shall be used in the circumstances below.

Open tendering is common with high value general purchases, technical equipment, and services. Tenders are invited from the public through the press for the purpose of obtaining offers for the services/goods required.

Tendering process

- i. The invitation shall be placed in a newspaper using the same language as the invitation and being of sufficient circulation to attract adequate competition.
- ii. Sufficient time is allowed for the tender to reach the suppliers and for them to submit their responses.
- iii. General and special conditions of contract shall be of a kind generally used nationally.
- iv. Tender documents shall be released to the prospective suppliers without any fee
- v. Repeat bidding is allowed provided at least two thirds of members of the procurement committee give approval in writing.

Tender opening and evaluation process

- i. Tenders are received in a central tender box.
 - ii. on the closing date, the tenders are withdrawn from the tender box and opened by the procurement committee
 - iii. each member signs and dates the tenders
 - iv. the tenders are then passed to the procurement office for preparation of a bid analysis and recommendations are made based on criteria pre-set by the procurement committee/users
 - v. tenders are then returned to the procurement committee for awarding
 - vi. Once the awards are made, the procurement unit raises the Local purchase/service order (LPO/LSO), sent to ED for approval and sends the same to the supplier. Supplier must sign the orders to confirm receipt and acceptance.
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5.2 REQUEST FOR QUOTATION (RFQ)

Suppliers are invited to submit quotations for goods, services, or works based on specific requirements outlined in the RFQ document.

5.3 REQUEST FOR PROPOSAL (RFP)

Suppliers are invited to submit proposals for complex services or projects. The RFP outlines the requirements and evaluation criteria. This method is used when the desired outcome needs to be more clear and detailed proposals from the supplier are required.

5.4 SINGLE SOURCING

Engaging a single supplier on specific circumstances, such as urgency, exclusivity, or specialized requirements.

Only in exceptional circumstances shall this apply including

- Supply of goods or services is urgently needed and delay would be detrimental to the programs.
- When only one vendor is qualified to fulfil the requirements.
- Only one supplier/service provider is available and satisfactorily capable of performing the assignment/contract.

Single sourcing will only be allowed when justified by the procurement person, reviewed by the Head of department, and **must be approved by the Executive Director**.

5.5 CONSULTANCY AND CONTRACT PROCUREMENT

All consultancies and contracts carried out on behalf of ADS SR shall be carried based on the following procedure:

- 1) An Expression of Interest (EOI)/Proposal highlighting the specific terms of Reference (TOR) and Scope of work (SOW) shall be sent out through print and social media.
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- 2) Once a suitable consultant is selected a contract will be drafted between ADS SR and the consultant clearly stipulating the terms, timelines, deliverables and consultancy fees.
- 3) During different timelines, the consultant will provide reports highlighting the progress if any which are to be reviewed and approved by the person supervising the assignment and Finance person. Payments will be made after the approval of the reports is carried out and these reports will be accompanied by an approval form from the supervisor and any departmental head instructing/confirming that the consultant can be paid.
- 4) The Finance team will then make the payments vouchers and attach all required documents including the reports and memo.

6.0 PROCUREMENT DOCUMENTATION AND OTHER DETAILS

6.1 TENDERING FOR PRE-QUALIFIED SUPPLIERS

ADS SR shall tender for pre-qualification of suppliers annually. This process shall be handled by the procurement committee.

The tender must include complete, clear, and accurate information on:

- Responsibilities of contractor/specifications of tasks/type of service required.
- Minimum qualifications and experience required
- Terms of service
- Identification of ADS SR as the originator, giving full details of where and by when (date and time of bid closing) the offer must be submitted
- Time frame for the proposed order, from issue of order to final delivery.

The process of shortlisting suppliers shall follow procedure as below:

1. Categorize all goods and services for the period of twelve (12) months
 2. Establish the selection criterion for supplier rating.
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3. Advertise based on the criteria established in (2) above, sending out Request for Qualification (RFQ). The mode of advertisement and timeline for the same shall be communicated by the committee. These tenders shall be placed in tender box located at visible location usually reception. Tender box shall have double lock. The keys shall be assigned/given by ED to **the program person** (whom the ED shall choose for that purpose). In no instance, before tender box opening, shall anyone hold both keys for the locks.
4. Opening of the tender box. The process of Opening the tender box should be done in presence of all the stakeholders with transparency to everyone. This should be on a specific day communicated in advance. All the tenders must be signed by the present procurement committee members.
5. Analysis, evaluation, rating and vetting of suppliers based on the pre-set criteria
6. Preparing final list of recommended suppliers
7. The committee then visits premises of shortlisted suppliers. Where necessary, reference checks are done
8. The final list be signed by all Procurement Committee members and be approved by the ED and/or approval authority as may be determined.

The pre-qualification of suppliers is important when handling urgent requisitions. ADS SR is able to achieve following:

- Procure faster.
- Have prior knowledge on quality of products
- Reduce administrative time and costs involved in tendering.
- Access goods and services that ADS SR is already familiar with and establish better working relations with suppliers.

6.2 PROCUREMENT PLAN

A procurement plan is a document that identifies procurement needs, supplier for the needs and timelines for the deliveries. It provides guidelines on timelines of purchase and is intended to increase efficiency, effectiveness and transparency of procurement process. The procurement plan shall be prepared project officer/person as may be determined by the management. The procurement plan shall be approved by the Executive directors.

This plan must be reviewed and submitted quarterly. The officer in charge of procurement initiates the process.

The plan must include the below information;

- Good or services to be purchased. Description of the goods
- Estimated period/timelines as per calendar year to be purchased
- Estimated costs
- Budget line.
- Type of procurement method to be used
- Head of Finance to Indicate if the basic donor requirements/approvals if any as per the grant agreement

Procurement plan takes the following procedure

I. **Introduction:** Provide a brief overview of the project or organization for which this procurement plan is being developed. State the main objective of the procurement plan.

II. **Project Scope:** Describe the project in detail, including its goals, objectives, and expected outcomes. Also define what goods, services, or works will be procured as part of this project.

III. **Procurement Objectives:** Outline the specific objectives of the procurement plan, such as cost-effectiveness, quality, timeliness, and compliance with regulations. Specify the budget allocated for procurement activities.

IV. **Procurement Methodology:** Describe the procurement method to be used (e.g., open tender, request for proposal, sole source, etc.). Define the criteria for vendor selection, including technical, financial, and legal considerations.

V. **Procurement Schedule:** Provide a detailed schedule for procurement activities, including key milestones, deadlines, and deliverables.

VI. **Procurement Team:** List the key personnel involved in the procurement process and their roles. Describe how the procurement team will communicate with each other and with external stakeholders.

VII. **Vendor Management:** Explain how potential vendors will be identified and approached. Describe the process for evaluating vendor proposals and bids. Detail how contracts will be managed, including performance monitoring and dispute resolution.

VIII. **Risk Management:** Identify potential risks associated with the procurement process and propose mitigation strategies. Ensure compliance with relevant regulations, ethical standards, and best practices.

IX. **Budget and Financing:** Breakdown of the budget by procurement category and activity. Explain the source of funds for procurement activities.

X. **Monitoring and Evaluation:** Define key performance indicators (KPIs) for measuring the success of procurement activities. Outline the reporting mechanisms for tracking procurement progress.

XI. **Appendices:** Include any additional documentation that supports the procurement plan, such as sample bid documents, legal requirements, or reference materials.

XII. **Approval:** Include a space for the signature of the individual or team responsible for approving the procurement plan. Specify the date of approval.

6.3 CONFLICT OF INTEREST

ADS SR staff must avoid conflicts - actual or potential - between the interests of the organization and their own personal financial interests.

All procurement committee members must sign conflict of interest declaration form. All staff shall sign Conflict of Interest statement in their employment contract.”

Staff with interest shall be required to make disclosure of the same and disqualify themselves from the very process that would give rise to conflict of interest.

All Board of Directors shall sign Conflict of Interest statement annually.

6.4 CONFIDENTIALITY

Procurement committee and personnel shall exercise confidentiality on procurement information received.

6.5 DISQUALIFICATION OF SUPPLIERS

A supplier may be blacklisted and removed from the list of potential, current and future suppliers when it is discovered that the supplier is no longer suitable to do business with ADS SR

6.5.1 Process of disqualification

The procurement committee shall upon their discretion decide on the process of supplier disqualification after which the supplier can re-lender his/her services giving justification for improvement on the reason for disqualification. List of disqualified suppliers shall be approved by Executive Director and, where assets are involved, Board Chair or his appointee to approve. In cases where such disqualifications may result into litigation, the board chairperson shall be notified and shall approve the disqualified supplier list.

Incase of any grievance, the ED will request the Procurement committee to look at the issue and share a report. Based on the outcomes, the ED will write to the aggrieved party stating the outcome with justifications.

6.5.2 Grounds for disqualification

A supplier can be blacklisted on the following grounds:

- i. Where there is substantial conflict of interest between ADS SR staff and the Supplier or Supplier company
 - ii. Persistent delivery of substandard products and services that do not meet the agreed upon standards in contract.
 - iii. Supplier does not meet delivery deadlines consistently as indicated in contract with ADS SR.
 - iv. Unethical behavior including child labor, bribery and violation of environment regulations.
 - v. Frequent change of contract terms and conditions without justifiable reason that may be detrimental to the operations of ADS SR
 - vi. Where the Supplier goes into receivership or liquidation and legal existence is lost.
 - vii. Engaging in corruption or fraud with intent to influence decisions leading to awarding of contracts in their favor.
 - viii. Non-compliance with Kenyan national laws or other statutory requirements such as tax law requirements, social security requirements amongst others.
 - ix. Being declared legally bankrupt, insane or any other legal declaration that renders one incapable to enter into a valid contract under Kenyan law.
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- x. Those supplies that are proven to be or suspected to be supporting or have links with terrorist groups and organizations.

6.5.3 Duration of Disqualification

The period of disqualification shall be one year.

6.6 ACCOUNTABLE DOCUMENTS USED IN THE PROCUREMENT PROCESS

Procurement requisition - Notifies purchasing section of the requirement and authorizes purchase expenditure. Provides record for audit, who initiated the purchase, which authorized and what was requested.

Quotation's request (QR) - Communicates organizations needs to the bidders and invites them to make their offers

Bid analysis - Presents suppliers responses in a summary form for easier evaluation and comparison.

Minutes of a tender committee meeting This record the process of awarding/approval and acts as evidence of participation by different committee members.

Local Purchase Order (LPO) – Legal document, prepared by the procurement officer/person and must be signed by ED and the supplier organization.

Supplier Delivery note/Waybill – Evidence of delivery

Goods received note/Goods returned note (GRN) – Evidence of receipt.

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7.0 POLICY REVIEW

Policy review shall be implemented upon recommendation by the management to keep to date with the changing trends in the procurement process. Regular review is to enable management to address developing gaps in procurement due to the change in business environment, laws and regulations, ADS SR procurement needs among other reasons as may arise from time to time. 3yrs is recommended for a full review. Procurement policy review shall only be undertaken upon approval by the ADS SR Board.

8.0 ANNEXES

1.0 PURCHASE REQUISITION FORM

Ref No. _____						
Please provide the following goods						
REF	PARTICULARS	BUDGETED?	ACTIVITY	A/C	AMOUNT	
		YES/NO	CODE	CODE	KSHS	CTS
TOTAL						

Please attach quotations where applicable.

Comments: _____

Requested by: _____ Date _____
Requested by: _____ Date _____
Approved by: _____ Date _____

2.0 LOCAL PURCHASE ORDER

Ref Number _____

Purchase Requisition No: _____

Date: _____

Suppliers name of & address _____

Expected name & Delivery _____

Qty Ordered	<u>Description</u>	Unit cost	Amount Kshs

3.0 FIXED ASSET REGISTER

[illegible]