



Procurement and Logistic Policy

Procurement and Logistic Policy



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OFFICE MEMORANDUM

Subject: MF Procurement and Logistic Policy

The set of guidelines on the above subject has been approved by the General Body Meeting on 19th June, 2021. The reviewed policy will be effect from 12 March, 2024.

We record our gratitude and thanks to the General Council and Executive Committee members of MF for providing necessary briefing and guidelines during finalizing this policy. Thanks to the MF staff for their suggestions during developing the policy.

Our heartiest thanks to our Donor/Partner for their technical support for developing the policy.

This supersedes all other provisions guidelines and office orders on the subject.



(Gobinda Ghosh)
Director
Mukti Foundation (MF)



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1		Revised Draft	n/a
2	19th June, 2021	Final	Executive Committee
3	12 March, 2024	Major revision through external consultant based on the different donors recommendation	Approved by Executive Committee

SECTION 1 INTRODUCTION

1. Introduction

1.1 Title of this policy

The Policy shall be called the MF Procurement and Logistic Policy of the MF (Mukti Foundation).

1.2. Background of the policy

Mukti Foundation is a Non-Government Organization (NGO). A small group of socially conscious youth deeply hurt and moved by unjust social discrimination in respect of class, caste, creed a gender in a bid to wage struggle against all sorts of social injustice, came forward to form this organization. Mukti Foundation came into being in 1996 and subsequently registered with the NGO Affairs Bureau vide registration No 1391 dated 08 June 1999. The organization is also registered with the Society Act. Vide registration no. Satkhira-124 dated 11 April 2005. The organization is also registered with the Micro Credit Regulatory vide registration No. 0000381 dated 23 February 2009. The organization is also registered with the Social Welfare, Reg. No. Satkhira-1092 dated on 10 November 2010.

MF works with diverse stakeholders including poor and under privileged community of the society particularly (i) the landless poor wage labours, (ii) poor marginal and small farmers, (iii) destitute women, particularly the widows, divorced and abandoned who are the worst victims of gender biased society, (iv) disable People & Natural Disaster affected people, (v) members of the economically and culturally backward religion-ethnic minority community specifically the lower castes and out-castes, (vi) the share croppers and the poor engaged in different professions.

It may be mentioned here that during disaster (AILA) time Mukti Foundation responds to the need of the distressed people irrespective of their economic condition with special preference to the poor. Mukti Foundation also worked in water and sanitation sector in the same way.

ToGETHER: "Towards Greater Effectiveness and Timeliness in Humanitarian Emergency Response" project is funded by Malteser International, Germany. The goal of the project is to reduce the impact of disasters on local populations in countries of operation through localized, effective, rapid, and accountable humanitarian assistance. The vision of the project is to promote equal, complementary partnerships between local/national NGOs and international NGOs. The project objectives are to strengthen the leading role of local/national NGOs in the humanitarian system ("local leadership") and the localization agenda at an international level. The ToGETHER program also aims to transcend organizational boundaries and enable all local and international partners involved to jointly develop approaches to humanitarian challenges that they would not have been able to realize on their own to this extent and with this added value.

1.2.1 Vision, Mission, Goal & Objectives

Vision:

To bring the positive change of livelihood like to get better education, improve health, safe water, deluge environment, employment and to establish rights to khash land of the poor through participation and accountability.

Mission:

To establish a non-explicated, environmentally sound, surplus and rights-based community.

Goal:

The goal of Mukti Foundation is to promote participation, self-reliant, environmentally sustainable development of the poor to help them alleviate poverty and achieve their potential and empowerment.

Objectives:

The principal objective of Mukti Foundation has been to work towards their increased self-reliance of rural grass root people by the provision of:

- a) Establishing the rights of the poor in the society and make them self-reliant.
- b) Undertaking development activities for the rural poor irrespective of religion, caste, creed and gender.
- c) Alternative institution building i.e. group formation, savings credit etc. for the resource poor and under-privileged community especially destitute women, landless poor and wage labour.
- d) Alleviate poverty through different income generation.
- e) Eradication of illiteracy.
- f) Improvement of health, sanitation and nutrition status of the under privileged community particularly the women, landless poor, Family members with disabilities, Flood affected People, wage labour and out-caste community.
- g) Ensuring human rights and empowerment of resource poor, disable community & Flood affected People.
- h) Eradication of gender violence in the society.
- i) Sustainable utilization of natural resource and conservation of biodiversity; and
- j) Proper utilization of indigenous knowledge in development activities.

On a nutshell, Mukti Foundation is committed to assist the development movement of the people centered in the development perspectives.

Legal Status

Sl.	Name of Registration	Registration No.	Date
1	NGO Affairs Bureau	1391	08 June 1999
2	Society Act	Khulna-124	11 April 2005
3	Micro Credit Regulatory	0000381	23 February 2009
4	Social Welfare	Satkhira-1092	10 November 2010

The Management and Operation

The General Body of MF is the highest decision-making body. On behalf of the General body the Executive Committee takes the major strategic decisions and provides guidelines to the Director. The Director is the CEO of MF and takes major decisions relating to regular operations and management.

Key features of the governance towards transparency include the following:

- a. There are 21 members in the General Body of Mukti Foundation who generally meets once a year.
- b. The members of the General Body elect 7-members Executive Committee (EC) for the period of two years. The EC sit once in a quarter to look after the activities of the organization and takes necessary decisions.
- c. In case any changes are required to be made in the constitution, an EGM needs to be called with prior notice along with proposed changes.
- d. Project proposal, Annual Activity Plan and Budget needs to be presented and approved by the EC.
- e. The annual report needs to be authorized by the General Body.
- f. Auditor's appointment is also the business of the General Body. It could be worthwhile to mention here that the Auditor of MF needs to be a Chartered Accountancy Firm enlisted with NGO Affairs Bureau (The Regulatory Body) and Development Partners, if required.

Organization Policy and Code of Conduct

- a. Employees of MF must maintain highest standards of professional behaviour and integrity at work. They must demonstrate mutual respect irrespective of gender, religion or status.

- b. No one is allowed to get involved in any action or behaviour in such a way that may create a conflict between individual interest and that of organization or tarnish the image of the organization. Each will foster *Teamwork* maintaining appropriate workplace behaviour.
- c. No individual shall behave in such manner that intimidates other employees in any way.
- d. Any form of harassment including sexual harassment, persecution or discriminatory practices, insubordination at the workplace will be dealt strictly as per Human Resource Management Policy (in short HR policy).
- e. No one is allowed to divulge or misuse confidential information of the organization in any form or capacity.
- f. Engagements of MF employees with other entities, that go against the interest of the organization or affect working relationship with MF, will not be accepted and may lead to disciplinary actions being taken against him/her.
- g. The employees of MF shall not be engaged with any political (partisan) or other activity detrimental to the interest of MF or the state.
- h. Employees must deal with the counterparts, associates, external entities or co-workers, customers honestly and diligently to maintain transparency.
- i. All staff of MF will contribute towards maintaining a healthy and safe working environment within the organization.
- j. Each employee must safeguard properties/assets belonging to MF.

1.3 Purpose of the Policy

A standard procurement process is a prerequisite for effective procurement management. The fundamental requirement for ensuring better procurement management process with a well-defined procedure. The benefit of the policy is that the procurement procedures will be maintained properly and it will be possible to establish a strong system.

The purpose of this policy is to improve the MF procurement management system, which can be viewed as a tool for fulfilling the basic requirements of procurement procedures. This policy helps to establish an overall controlling mechanism to ensure better degree of financial control, transparency and accountability in their day-to-day operations for providing positive support in administering the overall activities of the organization for smooth procurement process. It is endeavored that this policy will be acted as the most important tools to measure the organizational financial performance by the management as well as stakeholder of the organization.

1.4 Scope

This policy will cover procurement rules and regulations during the time of any contracts for procuring any goods and services, works and services using MF fund.

1.5 Process of Amendment

To face changes and to meet the demand of time, the Executive Director, in consultation with the Executive Committee, will initiate amendments to this policy with a special circular, which will later be incorporated in the updated policy. Amendment of this policy must compliance with prevailing rules and procedures of the country and national and international standards. All relevant employees may recommend amendments to this policy through staff meetings or in writing to the Executive Director. A committee might be formed to provide recommendations on specific policies. The Director will facilitate the process in constituting the policy revise committee. The Director will forward the recommendations to the Executive Committee for any revision of this policy.

1.6 Updating policy

Any amendment, alteration, addition or deletion of any provision(s) contained herein or any attachment to this policy, must be approved by the Executive Committee through the Executive Director.

1.7 Interpretation

In the occasion of any dispute, the Executive Director on behalf of the Executive Committee of MF will give interpretation.



A handwritten signature in black ink, appearing to be "H".

A handwritten signature in black ink, appearing to be "S. S. S.".

SECTION 2 PROCUREMENT PROCEDURE

2. PROCUREMENT PROCEDURE

2.1 Description

Procurement is the overall process of procuring goods, civil works and services which includes all functions from the identification of needs, selection and solicitation of sources, preparation and award of contract, and all phases of contract administration through the end of a services' contract or the useful life of an asset. Although MF retains a decentralized organizational approach to procurement with "Buyers" responsible for the procurement of goods, civil works and services as required by projects/programs /departments/field offices/branch offices, this Procurement Policy manual sets forth a comprehensive framework of procurement and its policies and procedures, which are maintained by central procurement committee.

2.2 Procurement Principles

The following principles have to be followed in all procurement decisions made by MF staff as guiding principles:

Guiding Principles

2.2.1. Ensure Value for Money *MF will procure appropriate high-quality products at the lowest price. We should look to demonstrate cost effectiveness to ensure that the best value is obtained for the expenditure incurred.*

2.2.2 The Best meets the needs of the end user *to meet the need MF will procure the appropriate product that best meets the needs of the end user. This will take into consideration the quality of goods required, the urgency of the need, and the expected duration of need and required lifetime of the product.*

2.2.3 Control and Accountability *MF will ensure that appropriate levels of accountability are maintained throughout the procurement process. MF staff responsibilities will be documented and understood and internal controls including authorities will be followed at all times. The responsibilities of our partners and our suppliers will be clearly stated and where possible documented and they will be held accountable for fulfilling these responsibilities.*

2.2.4 Consistency in approach *MF will undertake procurement and supply chain management activities consistently across the organization and over time. This will streamline internal processes as well as our interactions with suppliers and our partners.*

2.2.5 Regulatory and donor compliance *MF will comply with all relevant laws, regulations and requirements when procuring goods or services. This will include any relevant national and international laws or tax regulations as well as specific donor requirements, for example for institutional donor funded projects such as the EC, USAID, SDC, FCDO etc.*

General Principles:

2.2.6 Transparency: All phases in the procurement process will be conducted fairly and transparently and must be accurately and thoroughly documented.

2.2.7 Accountability: MF is accountable to its beneficiaries and funders and thus must ensure all procurements are conducted in adherence to all legal requirements and MF principles and funder regulations.

2.2.8 Integrity: MF conducts procurements without consideration of personal gain and for the best interest of MF, resisting undue political pressure, avoiding personal abuse of power and promptly reporting unprofessional, unethical or illegal behavior.

2.2.9 Funder Objectives: All procurements must be reasonable and necessary for the achievement of the objectives of donor-funded programs.

2.2.10 Purchase Objective: MF will procure all goods and services consistent with the required quality and delivery, and at the most advantageous cost.

2.2.11 Competition: Procurement actions will be without favoritism and on a competitive basis, whenever practical, to obtain maximum value for cost. MF employees shall promote competition to the maximum extent possible

2.2.12 Ethical Procurement: MF staff must practice ethical procurement, through adherence to the policies below. Vendors must also adhere to key procurement principles, such as compliance with laws, ethical business practices, and related provisions.

2.2.13 Fraud: Fraud is defined as misrepresenting or concealing material facts with the intent to deceive and obtain an unauthorized benefit. In accordance with the MF ZERO TOLERANCE policy, all staff are required to immediately report any instance of fraud or suspected fraud and other related misconduct.

2.2.14 Conflict of Interest: MF staff must understand conflicts of interest, as discussed in the MF Conflict of Interest Policy. MF requires full and open disclosure when dealing with procurement. As such, MF employees and members of the Board must avoid strictly any conflict of interest or the appearance of a conflict of interest. MF employees and the Board members must at all times provide full disclosure of their actions or relationships with prospective vendors, contractors, or consultants.

2.2.15 Abuse of Power: MF is fully committed to compliance with all laws and relevant codes of practice relating to the protection of women and children. MF believes that any form of abuse and exploitation is unacceptable and will not be tolerated. MF is prohibited from working with known or suspected offenders.

2.2.16 Anti-Terrorism and Debarment Standards: MF must not engage in transactions with, or provide resources or support to, individuals and organizations associated with terrorism or actively debarred by the U.S. Federal Government. Prohibit transactions with terrorist, debarred or sanctioned entities/individuals for several foreign governments, such as the United Kingdom and Canada, as well as multilateral organizations, the United Nations and the European Union.

2.3 Annual Procurement Planning

Considering the need MF will prepare annual procurement planning of departments/projects/ programs/field offices/branches. Advance procurement plan has proven to get leverage successful supply chain. A good procurement plan is what, when and how the expected materials will be delivered in cost effective manner. A comprehensive list of all planned procurement activities for the year will be generated and procurement/bid/tender award review committees will determine a plan to manage the procurement. Following are major parts of good procurement planning-

- The annual procurement plan will guide day to day operational procurement planning.
- The program will identify their procurement needs and will develop the plan according to that need. The annual procurement plan will be reviewed and update quarterly basis.
- As per Delegation of authority (DOA) level the procurement plan will be approved.
- This procurement plan should itemize all commodities expected to be purchased over the year.
- The Procurement Plan shall contain the following information:
 - Item No. (i.e., a numerical identifier)
 - Name of goods, services or works,
 - Estimated/required quantity and unit value, total value as per budget.
 - Funding source.
 - Delivery date when the goods are required to be delivered or the services or works are required to commence and be completed.
 - Any other relevant information e.g., locations where goods, services or works are required.

All procurement of MF will be completed according to the procurement plan except regular (events, utilities, communication cost, office supplies etc.). If necessary, this may be revised due to changed circumstances of budget, work plan, emergency and epidemic situation.

Type of Communication allowed: Procurement related communication should be written with requester/vendor/supplier/contractor/consultants and all other stakeholders. Electronics communication email, apps communication web links should also be allowable for procedures.

2.4 Procurement Management Process

Procurement Management Process is a system by which goods, civil works and services are purchased or leased from external suppliers. The procurement management process involves managing the ordering, receipt, review and approval of items from suppliers. A procurement process also specifies how the supplier's/vendor relationships will be managed, to ensure a high level of service is received. This is a critical assignment in Procurement Management. In essence, the procurement process helps the organization "to get what the organization has paid for".

However, the following series of requirements will take action by all departments/projects/ programs/branches/field offices under the organization through each phase of the procurement process:

- Procurement Planning
- Requisition
- Procurement Committee
- Sourcing of Suppliers
- Procurement Methods
- Solicitation and Evaluation of Offers
- Contract Review Committees
- Award of Contract
- Contract Management
- Asset Management

2.5 Specific donor requirements

This policy represents the common procurement procedures that shall be followed for all donors. But at the same time, it is important to comply with the donor requirements for a particular project during procurement. e.g. a donor may have specific requirements/instructions in respect to country of origin, has a lower threshold for open tenders, prohibition of a particular product or service, any ineligible cost items etc. In these circumstances MF will comply with donor/partners requirements.

Ineligible Suppliers. Any firms, vendors or individuals who are blacklisted as per law by the Govt. / MF/ partners/ donors or who produces tobacco or other goods/ services not allowed by MF/donors as per the policy and norms, MF will not procure commodities or services from them.

2.6 Requisitions

- Based on procurement plan respective personnel will prepare the requisition in line with budget
- Authorized person of the respective program/projects/departments will review/approve the requisition based on delegation of authority.
- After approval of requisition, it will be passed to the relevant personnel/department/program/ project/field office/Brach office to follow the process.

A requisition should include following requirements:

- Detailed description of goods and services.
- Quantity of inputs to be procured.
- Unit of measure.
- Required delivery/engagement date.
- Delivery location or location of services to be performed.
- Estimated price or cost; and
- Any additional information (i.e. standardization, preferred method of Shipment)
- In the case of goods, the description should include all technical specifications; Norms and standards; functional guarantees; inspection requirements etc.
- In the case of civil works, a requisition should describe the statement of works; quality, standards of different materials to be used; handling of defects; etc.
- In the area of services, requisitions should provide the terms of reference; qualification and experience of consultants required; output of reports; etc.

2.7 Procurement Procedures

All procurement must be fair, competitive basis and a competitive price be made for goods, works and services. To ensure fair and competitive prices, bid/proposal should be made to genuine vendors or suppliers through Tender/quotation. The Following procedure will be followed for a procurement:

2.8 Procurement Committee

The Executive Director will form a 'Central Procurement Committee' for one year to perform procurement related activities. In the central procurement committee, designated procurement personnel of the organization will appoint as member secretary. The committee will consist of five to seven members from different departments of MF. For any technical goods, services and works at least one technical person will provide support to the committee. In case of any local level purchasing for any particular situations, MF may form Procurement committee consisting of three to five members to procure goods or services and they are eligible to procure up to taka10 lac.

2.9 Responsibility and Authority

After receiving approved requisition, designated procurement personnel will call procurement committee meeting for initiating the procurement process.

The Central Procurement Committee or sub procurement committee will be responsible for the management of the acquisition, purchase, lease, or rental of all materials, services and equipment required by various departments of MF, regardless of funding source.

Responsibilities of the procurement committee Are:

- To make sure that procurement activities are initiated on time.

- Open and sign quotations/bids/proposals in front of Procurement Committee members
- Analyze the quotes/price offers and make the recommendation for the selection of suppliers.
- Ensure quotes are received in line with invitation/ request.
- Physically visit to/of respective vendor & talk with supplier/vendors (if necessary)
- Examine samples provided from supplier as required (if necessary)
- Comply authorization level (DOA) and procurement policy of the organization.
- To ensure the procurement plan as specified in the requisition.
- To evaluate offers, (as per specific rules).
- Ensure that the procurement process fulfils donor requirements which are not covered by this policy.

2.10 Procuring Item

This includes fixed assets, routine purchase, casual purchase, and lease of goods/equipment's/ supplies as well works (like civil work, labor) and services (like consultancy, insurance).

2.11 Review of Requisition & Quotation collection:

After careful scrutiny of the requisitions, the procurement committee will decide on procurement methods. If necessary, the procurement committee could give authorization to designated procurement personnel for handling the procedure. Authorized person could be collected quotations in favor of procurement committee.

2.12 Vendor Enlistment Procedure:

- MF might have enlisted vendor for different procuring items.
- Designated Procurement personnel will take necessary steps for enlisting vendor.
- The enlistment of vendors/suppliers will be selected through advertisement in newspaper/MF web site circular/publishing at professional web portal.
- Enlistment period will be applied and valid maximum for two years. The vendor list will be renewed/reviewed annually on the basis of need as possible of suppliers updated documents & track record.
- Due date on expiry of enlistment any suppliers that may be renewed by replacing their updated documents if there are no unsatisfactory record found wherever. During enlistment vendors prior experience, professional and financial capacity, after sales service, resource, delivery capacity etc. will be given priority to selection process.

2.12.1. Criteria of Vendors

The vendor should have the following criteria:

- Tax Identification Number Certificate.
- Valid trade license and Value Added Tax Registration (if applicable).
- Experience (In terms of number of years and/or track record) of the firm in business for the group of items for which enlistment is solicited.
- Following scrutiny of the applications, all selected vendors shall be notified by the Procurement Committee.
- A copy of Final list of enlisted vendors shall be sent to Finance department for their record.

For a local level purchase or any pandemic or emergency, MF may relax one or more of the above criteria.

2.12.2 Categorizing Types of Purchases

The Procurement committee may identify at least 2-3 vendors of each "category". The designated procurement staff will develop the broad procurement categories. The following are examples of the vendor categories; more could be added, or some removed, based on individual MF needs:

- Stationery Items
- Travel Agent

- Equipment Maintenance (computer, photocopier, etc.)
- Computer and Information Technology Equipment
- Office Supplies
- General Repairs
- Printing / Photocopy
- Vehicle Repairs
- Newspaper Advertisement
- Computer Software
- Medical Supplies
- Construction/Civil work
- Furniture
- Hotel Accommodation
- Restaurant
- Food Supplier
- Hygiene / Dignity kit items
- Emergency Supplies
- Suppliers
- Others

2.13 Methods of Procurement

Depending on the nature and value of the procurement goods, works and services, the commonly used procurement methods of MF will be as follows:

- Local Purchase; Direct Purchase
- Request for Quotation (RFQ).
- Invitation to Bid/Tender.

2.13.1 Local Purchase/Direct Purchase

When the value of the procured items is Tk. 10,001 to 100,000 MF will follow the local purchase method by collecting minimum three spot quotations, in this stage the involvement of procurement committee is not required. Project Team/Program team will take initiative for this type of procurement. After comparison of the spot quotations, purchase orders will be provided to deliver the items/services.

2.13.2 Request for Quotation (RFQ)

MF will follow the Request for Quotation (RFQ) method for the procurement of goods, services and/or civil works where the contract value is between Taka 1,00,001 and Taka 15,00,000. For Taka 100,001 to Taka 500,000 there should be collected at least three Quotations for comparison. For taka 500,001 to 10,00,000 should be collect at least five Quotations and for taka 1,000,001 to 1,500,000 should be collect at least seven Quotations for comparison.

- The designated procurement staff will circulate request for quotation/invitation for bid to enlisted or established vendor for submitting quotation. The proposal/request for quotation may be collected from vendor through email or hand to hand based on the urgency or nature of procurement.
- The Request for Quotation shall be forwarded simultaneously to all the selected suppliers. This is to ensure that all suppliers are given equal time (three to seven days) to prepare and submit their quotation.
- If failure of the minimum required quotation collection or in the timeline, the procurement entity will extend time or re-issue RFQ or search sole source selection process with proper justification. During the preparation of Request for Quotation, the following should be ensured;
 - delivery terms
 - specific technical characteristics for the product
 - quantity of the product
 - mention the condition if installation and/or maintenance and/or after sales service and/or spare parts are required

- deadline for receipt of quotations
- Terms on VAT, Tax and transportation etc.
- evaluation criteria (Need base)
- If any others.
- For uncommon item or item not available among the enlisted vendors, MF will go for new collection of quotation from others.

2.13.3 Invitation to Bid/Tender

- If the value of the procuring item more than Tk 15,00,001 (Fifteen Lac) MF will follow the Invitation to bid/tender.
- The procurement committee will circulate advertisement to any local or national newspaper, website of MF for submitting quotation in sealed envelope.
- The advertisement will contain all specifications of the procuring items and the criteria of the supplier including to whom the quotation should be addressed.
- If all criteria of procurement items or services are not covered in the advertisement, MF will prepare separate tender schedule, which will be mentioned in the same advertisement.
- There should have minimum ten working days for submitting the quotation. It could be flexible in pandemic or emergency /special case/consideration in five to seven days.
- The advertisement should be mentioned the place, date and time for opening the tender box.
- The tender box will be opened in the presence of tender providers.
- During the pandemic situation, due to prohibition of people gathering, tender representatives will not allow for presence in the tender box opening time. There can be an option of virtual presence if there any demand.
- All the procedure must be documented, approved and preserved properly by assigned personnel.
- For any single ITB/Tender (value more than Tk. 50 lac), if management seeks the Executive Director form a review committee consisting of 1 to 3 members for further check the entire process before issuing the purchase/work order. As per the recommendation of review committee the final approval of procurement will be given by Executive Director.

Standard time frame of procurement process:

- An open tender process may take time to complete 30 to 35 working days from received approved requisition including advertising, suppliers bid response, evaluation and to issuing purchase order/contract. RFQ
- An RFQ process may take time to complete 20 to 25 working days from stating approved purchase requisition to issuing purchase order
- Direct/Local Purchase may take time to complete 10 to 15 working days from stating approved purchase requisition to issuing purchase order.
- These may relax on emergency or any special cases.

2.13.4 Alteration or deviation of procurement method:

If any special circumstances faced challenges to follow the respective procurement method and are required to change the procurement method, there will be provisions to change the prior method with proper approval from Executive Director (Annexed Approval process). In this case, the Procurement plan may be revised if required.

Split Procurement: Large quantities of the same type/items goods should not be divided into multiple/several procurement activities. This type of plan/requisition/work order is considered as split purchase, which is not permitted.

2.14. Ceiling of Quotation

The summary of procurement procedures mentioned below:

Amount	Amount	Source	Quotation/ Tender	Mode of procurements
(Goods/Works/ Non consulting Services)	Up to Tk. 10,000	Open market	No quotation	No procurement process is needed
(Goods/Works/ Non consulting Services)	Tk. 10,001-100,000	Open market/Enlisted Vendors	At least three Spot Quotations	Local/Spot purchase (No obligation for involvement of procurement committee)
(Goods/Works/ Non consulting Services/)	Tk 100,001-500,000	Open market/ Enlisted Vendors	At least three Quotations	RFQ (Procurement committee involvement is required)
	Tk. 500,001 - 1,000,000		At least five Quotations	
	Tk. 1,000,001 to 15,00,000		At least seven Quotations	
(Goods/Works/ Non-consulting Services/)	Above Tk. 1,500,000	Open market/Enlisted Vendors	Open Tender	Open Tender (Procurement committee involvement is required) *More than 50 lacs (Tender review committee will review the procedure)
Consultancy Service	Uo to tk 4,00,000	Open market/Enlisted vendor	At least three quotations through RFQ as per ToR.	
(Thresh hold Note for Ref. clause 4.2)	More than Tk. 4,00,000	Circulation to newspaper or web site	Open tender	Open Tender To be published RFP at newspaper and relevant web portal

During any emergency, natural disaster, humanitarian crisis and pandemic situation like Covid 19 MF requires to procure the goods and services for emergency responses, this policy will not be applicable and in that situation, organization will follow the MF-Financial Contingency Policy.

2.14.1. Delegation of Authority (to be set ref as per finance policy)

Delegated Authority	Delegated amount
Executive Director	More than Taka 10,00,000
Director	Up to Taka 10,00,000
Program Coordinator/Team Leader	Up to Taka 5,00,000
Project Manager/Project Head	Up to Taka 3,00,000
Finance and Admin Coordinator/ Program Manager or Equivalent	Up to Taka 2,00,000
Project Manager or equivalent /Area Manager/ Branch Manager or equivalent	Up to Taka 100,000

The Director can also delegate his/her authority in writing to any senior official for special case. If any person is involved with the procurement processes, he/she cannot approve.

2.15. Segregation of duty

It is assumed that many MF personnel to be involved with the entire procurement process. For ensuring transparency and accountability of staff, the process should not be fallen entirely on the shoulders of one person. The duties of responsible person will be segregated as per the following task.

- Procurement Planning
- Preparation of requisition
- Perform as a member of Procurement Committee
- Perform as a member of Review Committee
- Providing work order,
- Receiving and storing goods,
- Approval Authority,
- Making payment and keeping the accounting records.

MF management will ensure this segregation of duty during the entire procurement process.

Segregation of duties is a control policy of the organization which is no person should be given responsibility for more than one related function. Director is responsible to ensure the segregation of duties. Considering the resources MF has defined a SOD matrix as follows-

TASK	Responsible person (designations)				Remark
	Prepare by	Checked By	Reviewed By	Approved By	
PROCUREMENT MANAGEMENT					
Requisition	Field level program designated	Accounts /Finance	Program staffs	According to DoA	
Confirm Budget Availability	N/A	Accounts/Finance	N/A	N/A	
RFQ (Request for Quotation)/Tender call	Procurement Committee	N/A	N/A	N/A	
Distribute RFQ/Tender call Publish	N/A	N/A	N/A	N/A	Assigned person from committee
Collection Quotation	N/A	N/A	N/A	N/A	Committee /Assigned Program Person
Open quotation/Tender/Bid/Proposal	N/A	N/A	N/A	N/A	Committee / Assigned Program Person
Prepare Comparative Statement	Assign person from committee/Program	N/A	N/A	DoA	
Analysis quotation and selection of vendor	N/A	N/A	N/A	N/A	Committee/Program
Purchase order issue	Relevant Project team	N/A	Purchase committee	DoA	
Receive Goods and Service Note	Requester/Logistics/ Finance person	Relevant Project Lead person	N/A	N/A	

Payment Document	Accounts/Finance	Finance Manager	Project Lead	DoA	
INVENTORY MANAGEMENT					
Receive inventory (sign)	Store/Logistic Officer	N/A	N/A	N/A	
Prepare receiving report	Store/Logistic Officer	N/A	N/A	N/A	
Review and approved receiving report (sign)	N/A	N/A	N/A	Relevant project lead	
Prepare stock issue	Store/Logistic Officer	N/A	N/A	N/A	
Review and approved stock issue	N/A	N/A	N/A	Relevant project lead	
Conduct Physical Inventory (physical count)	N/A	N/A	N/A	N/A	Internal Auditor/Assigned person/Team
Review and approved Physical Inventory	N/A	N/A	Relevant project lead	D(F)	
Purchase of equipment (see procurement)					
Receive fixed assets items (sign)					
Issued assets ID number	Accounts/Finance	N/A	N/A	Relevant project lead	
Assigns assets to the user	Accounts/Finance	N/A	N/A	Relevant project lead	
Maintain inventory	Accounts/Finance	N/A	N/A	Relevant project lead	
Prepare disposal list	Admin	Finance Manager	Assistant Director (Finance)	ED/ Director	
Approve disposal list	Admin	Finance Manager	Assistant Director (Finance)	ED/ Director	
Arrange disposal	Admin	Finance Manager	Assistant Director (Finance)	ED/ Director	

2.16. Comparative Statement & Selection

- The Procurement Committee shall verify the quotations and then assigned Person by Procurement Committee shall prepare a Comparative Statement based on the quotation received and then recommended to approval authority for approval.
- The Procurement committee shall reserve the right to accept or reject any or all quotations/tenders with proper justification.
- Considering the quality of products and services, the Procurement committee may not recommend lowest bidder with proper justification.
- A vendor must be selected considering price, quality and other circumstances. The price can be

negotiated, but the quality cannot be compromised in any circumstances.

2.17. Payment Procedures

- After confirmation of goods/ works/ service received by responsible officials and reviewing all necessary supporting documents as well as approval by authority. The Finance/Accounts officer shall arrange the payments.
- Payment to the supplier against their bills shall be made by Account Payee cheque only. Any exception might be approved by Executive Director based on vendor's request and justification.
- While cash need to pay in the case of spot purchase and the volume is more than taka 10,000 in that case proper justification should be enclosed with the approval from Director up to 20,000, Director up to taka and more than 50,000 there should be required approval from Executive Director.
- All papers and documents with regard to purchase like requisitions, indent, quotation/tender, comparative statement, challan/bill, money receipt, purchase order, Goods Receive Note (GRN) shall be made available with the payment vouchers.
- Before making the payment to the suppliers against their bill Accounts shall check the bill, material-receiving report, purchase order. All kinds of purchase must be within the approved budget.
- For any discrepancies or error, Finance will bring these to the notice of Procurement committee and management authority for corrective action.

2.18. Language

Solicitation documents and offers shall be prepared in one of the following working languages, selected by the respective Unit:

English or
Bengali.

2.19. Letter of Invitation

A letter of invitation to solicit offers should be drafted on MF letterhead and include:

- Reference to the specific quotation, bid or proposal and title.
- A list of supporting documents issued; and
- The date and place of submission and bid or proposal opening.

2.20. Instructions to Offerors /bidders/vendors

The instructions to Offerors should be drafted to meet the particular requirements of individual contracts. The purpose of the instructions is to convey all relevant guidelines to govern the preparation, submission and evaluation of offers.

- The instructions must also include a list of documents required to form a complete tender.
- as well as notice to Offerors/ bidders that offers may be rejected unless substantially responsive.
- A substantially responsive offer is one that conforms to All the terms, conditions and specifications included in solicitation documents, without material deviations or reservations.
- When determining the offer period, the procurement committee must ensure that adequate time is available for Offerors to prepare their quotations, bids or proposals, taking into account the size and nature of the project.
- In the instruction, these are mentioned that interested vendors will not be involved child labour in their office and other places
- The vendors who have a track record of GBV issues not encourage to participate in the bidding process
- The offer period may be anywhere from one week to eight weeks depending on the complexity of the desired input (e.g., standard off-the-shelf item vs. a detailed proposal).
- Alternate Proposals solicitation documents should be clearly indicated whether Offerors/bidders are permitted to submit alternate proposals or not.
- The alternate proposals should include detailed specifications, environmental specifications, where applicable and associated costs, to allow a fair technical and financial evaluation of the proposal.

2.21. Modifications to Bids/Proposals

The instructions should stipulate whether any additional information, clarification, correction, or modifications of bidding documents should be distributed to Offerors / bidders prior to the deadline as bidders can take appropriate actions. Similarly, Offerors/bidder should also have the right to modify or make corrections to bids or proposals, provided that any such modification or corrections are received by the Procurement Committee in written prior to the time specified for submission of bids/proposals. The original bid/proposal thus modified or corrected would then be considered as the official offer.

2.22. Checklist for ITB and RFQ

The following checklist may be used to assist in the preparation of instructions to Offerors/bidders and indicates subjects that should be addressed:

- Language of the bid or proposal.
- Number of quantity/units required;
- Validity period of the offer;
- Warranty period of the goods, civil works, and/or services requested;
- Any document(s) other than those issued as a part of the solicitation
- Document which the offeror/bidder must include in the tender (e.g., technical Description, drawings, quality control, environmental impact, etc.);
- Procedures for dealing with queries raised by offerors/bidders;
- Instructions for packing, labeling, and addressing the Offer;
- Circumstances under which alternate offers may be submitted;
- Arrangements for the opening of tenders;
- Procedures for dealing with arithmetic errors found in offers during Evaluation;
- Evaluation criteria;
- Rules relating to the disqualification or rejection of offers (e.g., late submissions, transposed figures, incomplete submissions, deviations); and
- Procedures for dealing with protests.
- Cancellation or reject of Quotation, Bid, Proposal:

The Procurement Committee reserves the right to reject any quotation, bid, or proposal if it finds any misconduct, Safeguarding policy, PSEA policy, ABC policy, and any violation of other restrictions by the suppliers.

2.23. Purchase Order /Work Order

An authorized/designated person shall prepare the Purchase Order for procurement of goods or a contract for services. The purchase order will be signed by the designated person. Purchase order should include the following conditions:

- Vendors/Suppliers should have a trade license.
- Vendors/Suppliers should have Bank Account exception might approve by Director based on vendor's request.
- Vendors/Suppliers should have office address
- All materials shall be supplied as per work order.
- All materials shall have to be supplied within the stipulated time.
- Damaged or inferior quality or without required specification no materials will be received.
- Short in quantity of material shall not be received.
- Payment will be made through A/C payee cheque.
- Valid bills along with delivery challan should be submitted to the responsible office.
- Money Receipts have to be submitted when the bill is paid.
- Quantity, Quantity, timeline and Price shall be mentioned in the work order.
- Decisions about VAT and TAX shall be mentioned in work order.

- Decision about carrying/transportation cost shall be mentioned in work order.
- MF Policies and compliance issues shall be addressed in the work order.
- Work order validity/expiry period will be maximum 6 months from issuing of work order date.

2.23.1 Additional order/Variation Order:

If need to procure any additional order/variation order there should be submitted approved PR in reference to previous work order. There should be follow variation order may not more than 30% of original order. Procurement method not to be cross/change one method to upper another in this case. (like; total procurement amount on RFQ crossed to limit RFQ method and reached to tender method procurement/Spot quotation reached up to RFQ method) Variation PR & work order must should approved by Director (Finance or equivalent grade designated person). The unit price could not be changed in time of issuing additional work order.

2.24. Yearly Purchase Agreements:

Yearly Purchase Agreements are construct/ constitute/develop for up to 1 year in length that allow MF to order goods needed on a frequent, recurring basis. Yearly Purchase Agreements fix the unit prices for goods, and generally include a not-to-exceed ceiling value that offices must track. Yearly Purchase Agreements may only be issued after a full and open competition has been conducted.

2.25 When No Bids are Acceptable

If the solicitation process does not identify an acceptable vendor, the Procurement committee must document the results in the Bid Selection Form, and either launch a second RFQ or RFP process or look at alternatives.

2.26 Price increase after placing the work order

In any unusual situation/worst case scenario, when it is difficult/unable/failed to deliver/supply goods or services by the vendor due to price increased abnormally in this situation based on the application from vendor/supplier the procurement committee will sit and prepare a justification note mentioning the real ground and send their recommendation to Chief Executive. The CE will review and if necessary, will approve, based on the approval, designated procurement personnel will prepare revised work order/purchase order for remaining quantity/services.

2.27 Evaluation of Quotations, Bids and Proposal

The preliminary examination of quotations, bids or proposals determines whether the offers meet the procedural requirements of the solicitation documents. The purpose of such examination is to eliminate unsatisfactory offers from further and more detailed consideration, which fail to meet minimum standards of acceptability, thus rendered substantially unresponsive. MF Procurement Committee/designated person will responsible for evaluation of quotations, bids and proposals.

2.28. Evaluation of Quotations

Upon receipt of quotations, the proposal should be opened and assessed in the presence of Procurement Committee to ensure fairness and transparency.

All quotations should be evaluated against the minimum selection criteria to determine (1) if goods, civil works or services conform to designated criteria, and (2) if the Supplier is reliable; - considering the following factors:

- Conformity to specifications, statement of works or TOR;
- Product quality (i.e., conformity to national/international product standards);
- Delivery time and terms;
- Assessing the following documents-
 - trade license,

- VAT, TAX certificate
- last tax payable slip
- organization profile
- bank solvency
- work experiences

Compliance with General Terms and Conditions; after-sales services; and the landed price.

- The aforementioned information should be recorded on a suitable form signed by designated staff conducting the opening and appropriate witnesses.
- In the case of RFPs, a public opening of proposals received is not necessary, as financial proposals may not be opened without the completion of a technical evaluation.

2.29. Evaluation of Bids

- Upon the receipt and opening of bids, the proposals are to be evaluated by the Procurement Committee.
- All bids must be evaluated according to the specifications in the solicitation documents.
- The relative scoring system and evaluation criteria must be established before an ITB is sought. Each criterion should be attributed weight in relationship to the proposed program are as follows:
 - Conformity to specifications, statement of works or TOR;
 - Product quality (i.e., conformity to national/international standards)
 - Delivery time and terms.
 - Compliance with General Terms and Conditions; after-sales services.
 - Spare part(s) availability for the required period.
 - Technical and financial capacity of the vendors/bidders; and
 - The landed price.
 - If any others as required.

All bids should be tabulated on a summary sheet (Comparative analysis) duly signed and certified by Procurement Committee with approval from authority. Only bids offering goods, civil works or services with the characteristics meeting or exceeding those in the specifications and commercial terms shall be considered acceptable.

In respect of any Technical Proposal

- A proposal shall be considered non-responsive and rejected, if it fails to substantially satisfy the specifications TOR, or it fails to achieve a minimum technical score as specified in the RFP. A vendors/bidders response to the solicitation document is evaluated and points are attributed based on how well they meet the defined desirable criteria.
- Any offers, which do not meet this requirement, must be rejected as being non-responsive.
- The remaining financial proposals of vendors/bidders whose technical proposals are deemed unacceptable shall be remain unopened.

2.30 Supplier Performance Evaluation

To develop and maintain a list of qualified Suppliers, organization should evaluate the Contractor's performance, in the event that organization wishes to retain the Supplier in the future. Organization should assess the Contractor's performance identifying whether the Contractor "meets the expectation," "does not meet the expectation" or "exceeds the expectation under the following attributes:

- Quality of good and services;
- Delivery;
- After-sales service;
- Accuracy of documentation.
- Speed of response; and
- Cooperation.

2.31. Review of Procurement Processes

There will be a review committee for further appraising the entire process of procurement if the value more than Tk. 50 Lac, which is applicable for ITB/tender only. The main task of the review committee is to examine the process of procurement already been done by procurement committee and check the documents provided by bidders as well as criteria set out during the offer.

2.32. Pre- Conditions of Vendor/Suppliers Selection

Procurement of goods and services shall be made from reliable vendors/suppliers to ensure the supply of goods and services in time and at a competitive price. A supplier or vendor can be selected after fulfilling the following conditions. It should be-

- Reliable Bona fide business entity
- Duly registered with income tax authority and VAT authority
- Good reputation of work experiences will be preferable.
- Valid trade license holder
- Not blacklisted before by any organization
- Verify the Antiterrorism Check (ATC)

2.33. Mode of Payments

- less than Tk. 10,000 (ten thousand) may pay in cash.
- Above 10,000 (Ten Thousand taka), payment should be made through A/C Payee cheque.
- Payment should be made after deducting all sorts of VAT and AIT as per Govt. rules.

During payment the finance/administrative department must be reviewed all documents whether available or not following checklist should be filled and preserved with payment voucher.

Sl#	Checklist Items	√/X	Remarks
1	Requisition with approved plan		
2	Documents of Value for money: Invitation/ offer letter/Circular/advertisement Quotation/Price list/approved comparative analysis with recommendation from purchase committee/approved justification for selection where applicable		
3	Approved purchase order/work order/agreement/contract accepted by vendor where applicable		
4	Proof of goods/service receipts/stock entry/Technical certification/performance report where applicable		
5	Bill/Claim/Challan received from supplier		
6	Bill Checked by Admin/finance		
7	Necessary deductions (VAT, Tax, Advance, etc.) completed at source		
8	Invoice approved by Responsible Manager		
9	'PAID' seal on third party documents		
10	Cheque delivery/bank transfer sheet with bank seal		
11	Money Receipt/Acknowledgement Receipt received from Payee		
15	Ant-terrorism checked/ Anti-money laundering declaration		
	If any others necessary documents		

2.34. Emergency Procurement

2.34.1 MF Procurement procedure in the disaster/pandemic related emergency/crisis

MF has its formal procurement policy for all sorts of procurement activities but in the event of disaster/pandemic it is difficult to follow usual procurement procedures for immediate responses to the situation. Bids from contractors are usually ineffective for immediate needs depending on the severity of a disaster incident. For a disaster (natural or human made) and pandemic related emergency/crisis situation, MF will follow Financial Contingency Policy to procure any goods and services in the disaster related emergency/pandemic crisis situation for responding immediately. The central or sub-procurement committee will be responsible for all procurement. Any kind of emergency circumstances, Founder Director will be formed a sub-procurement committee consisting of three to five members. Any kind of emergency/pandemic the procurement policy will be relaxed.

The following will be considered for an emergency procurement.

- Any kind of pandemic situation
- Cyclone and natural calamity
- Man made disaster
- Movement restricted by the govt. announcement for pandemic
- Disaster occurs during the lockdown and country wide movement restriction
- Food, baby food
- Non-food items
- Hygiene and Dignity kits
- Water supply and sanitation
- House constriction/repair/goods supply
- Truck/pick up/van rent for an emergency basis for transportation of construction materials/goods supply
- Hiring of a car/bus/micro bus for transportation of staff working in emergency
- Medicine, medical equipment's purchase and delivery
- Conditional Cash grant for affected community
- Cash for food and work
- Horticulture and tree plantation
- Seed purchase and transportation
- Health and safety equipment's
- Rescue materials
- Consultant hiring for program development, assessment.

2.34.2 Emergency procurement process:

2.34.2.1 Procurement through Framework Agreements

When quantities are not known at the contract signature stage or in case of procurement of goods and services which will repeat frequently over a given period, a Framework Agreement can be established with suppliers. Typical examples include procurement of fuel, maintenance services, stationary and mobile phone & Internet airtime. Framework Agreements intend to lay down the essential terms governing a series of specific contracts to be awarded during a given period on the basis of an initial framework agreement and which will specify the duration, prices, conditions of performance and the quantities envisaged. The term of a Framework Agreement cannot exceed 1 year.

The Executive Director of MF shall consider whether a Framework Agreement, as defined above, is the right approach for the particular goods, works or services to be purchased. Decision should be made based on a value for money judgment by the Executive Director. Framework Agreements may be concluded with one or

several Contractors. In the second case they may take the form of separate contracts but concluded in identical terms. The award procedure for Framework Agreements shall comply with the same rules defined for informal solicitation methods since they may not be used in such a way as to prevent, restrict or distort competition. Framework Agreements cannot be signed following formal solicitation methods.

2.34.2.2 Exceptions to Competitive Procurement – Note on Waivers

In specific circumstances, MF can decide not to launch a formal call for tender. Although competitive bidding is the general rule, exceptions may apply in the following cases:

- When there is no competitive marketplace for the requirement, such as where a monopoly exists, where prices are fixed by legislation or government regulations.
- When - in emergency situations - delays linked with the tender procedure can hamper the project and its beneficiaries, for example (i) for projects whose duration is equal to or less than 3 to 6 months, or (ii) when the lives of the beneficiaries are at risk.
- When the security situation does not allow it or when public advertisement is to be avoided.
- When there has been a previous determination or there is a need to standardize the requirement; When offers for identical products and services have been obtained competitively within a reasonable period and the conditions of contract and price remain competitive.
- When, within a reasonable prior period, a formal solicitation has not produced satisfactory results.
- When the proposed procurement contract relates to obtaining services that cannot be evaluated objectively.
- When a formal solicitation will not give satisfactory results.
- Where one or more of the above circumstances occur, the Director may decide to waive the requirement of the competitive bidding process. Such a decision shall be fully documented and justified in writing and kept in the procurement file for later inspection.

If it is a compliance to need approval from respective donor MF will take approval from donor's representative before going to start the process or place order to the vendor explaining the proper justification.

2.34.2.3 Where Single Quotation is enough

Brand items which have a special reputation for their products and services, and will provide service warranty for a certain period, may be procured on the basis of a single quotation. In this exceptional case, detail specifications and price of different items must be obtained either from sales centers or from any publication (e.g. newspaper). The list of companies is updated from time to time considering the need to include or exclude vendors. The Finance and Admin Coordinator of MF will circulate the updated list with the approval of the Executive Director. MF will collect approval from donor's representative before going to place order to the vendor explaining the proper justification.

2.35 Procurement of Consultancy Services

Here, the term 'procurement of services' refers to short term consultants only. MF will follow the following steps for consultancy recruitment:

2.35.1 Establishing Terms of Reference (TOR) and Budget

The basis for the procurement of consultancy services from individual consultant(s) or a consultancy firm are well defined TOR that include the following parts:

- Background/overview of the context and why consultancy is needed.
- Objectives of the consultancies (if needed, broken down in smaller objectives)
- Modalities of the consultancy and in particular:
 - Number of consultant (if more than one)
 - Roles of each person in case of a team

- Duration of consultancy assignment (in number of working days)
- Documents to be examined/read, institution(s) to be visited
- Field/sites to be visited (duration in days must be specified)
- Report submission (format, report volume, and due dates must be specified)
- Any other information which may be relevant for the operational implementation of the consultancy.

2.35.2 Looking for and selecting the right Consultant(s)

Once the TOR are finalized, the following rules apply:

- The consultant must be selected according to the TOR
- A wide circular of invitations is spread through a network of potential resource persons, and the request for services may publish on relevant websites and in newspapers as needed.
- If the consultancy value is less than 4,00,000, MF will select consultant from enlisted consultant. In that case MF may select consultant through competitive process or single source selection.
- If the consultancy value is from 4,00,001 to above, MF will publish the request for proposal in the newspaper and relevant web portal
- Ideally 3 or more potential consultants are put in competition.
- Selection must be based on competence, quality, costs and ability to meet timelines.
- The final selection must be done based on the decision of the procurement committee; Procurement committee may include qualified staff member/external expert who have good knowledge of that based on the needs.
- Central procurement may involve based on the value and nature of consultancy.

2.35.3 Establishing a Contract

A standard format for a consultancy contract must be established. The contract contains, in addition to the standard articles, financial and operational conditions, applicable regulatory requirements, terms about ownership, confidentiality etc.

The payment is only made after the receipt of the final report and upon completion of all contractual obligations by the consultant. The responsible person must ensure that the consultant fulfils all requirements stated in the contract before the release of the final instalment of the payment.

2.35.4 Negotiating Fees

The fee of a consultant is negotiated on a transparent basis. Where it is not possible to assess the exact number of days for the assignment, fees are based on the effective days of the assignment.

2.35.5 Concluding the Agreement

Once the contract has been finalized and signed by both parties, the effective consultancy work will be implemented and monitored accordingly to the agreed conditions and time frame. The payment will be made according to the agreed schedule based on the agreement and MF.

SECTION 3 ASSET MANAGEMENT

3. Asset Management

Asset management is the process of maintaining records designed to preserve the value of physical assets controlled by MF. These Guidelines establish procedures and systems to ensure compliance with the MF Financial Rules and Regulations and to ensure accurate reporting of all physical assets. The Asset Management Guidelines consists of three sections: Asset Acquisition, Asset Disposal and Asset Loss or Theft.

3.1 Definition of an Asset

An individual asset is typically defined as an item with a minimum life expectancy of 1 or more and with a value of Taka 2,000 or more. Complete and accurate records, from acquisition to disposal, must be maintained for all assets.

3.2 Asset Management

Each Department/Branch/Field/Area/Project Office and Head Office is responsible for maintaining complete and accurate records of all asset acquisitions. Assets may be acquired through the following modalities:

- Purchase
- Transfer
- Donation

For each new asset, the following data should be collected and recorded in the Assets Register:

- Chart of Accounts
- Asset ID Number
- Serial Number
- Description (including Brand)
- Purchase Price/Unit Value
- Purchase Date
- Purchase reference (voucher number)
- Physical Location of Asset

3.3 Inventory/ Recording of Assets

Each Department/Branch/Field/Area/Project office asset Inventory should be updated by respective Personnel on half yearly basis to account for relocation, lapse of useful lifespan or eventual disposal.

3.4 Maintenance of Assets and supplies

Respected personnel of the Accounts and Admin/Logistics Officer are responsible for maintaining a complete and accurate record of assets. In accordance with this responsibility, they may designate a custodian in written, generally Accounts and Admin Officer of field/project office/regional office/district office/upazila office. The designated custodian is required to:

- Maintain a record and log of movement and disbursement of assets and supplies.
- Maintain and check the stock of supplies at regular intervals to ensure that.
- Restocking is done in a cost-effective manner; and
- Ensure that the supplies are stored under lock and key and supplies issued only against written requests.

3.5 Physical Verification/Inventory

A physical verification team will be formed who will be responsible to verify/count of inventory items including furniture, equipment and vehicles should be conducted at least once annually as the data included in the Asset Inventory. When the inventory is physically taken again at the end of the year such a crosscheck should ensure that:

- (a) All fixed assets, i. e., furniture, equipment, heavy machinery, and vehicles with an individual /single unit item value of Taka 2,000 (Two Thousand) or above are moved to the Assets register during the year.
- (b) Ensure that a serial number and a location are entered for each nonexpendable asset.
- (c) Submissions for disposals are prepared using the Request for Asset Disposal or Transfer (RADT) form and submitted to the Project/Area Chief, as required, and approved by the Directors.
- (d) Ensure that the disposal action is done by the Senior Officials and confirm by sign off on the RADT form that action has been taken.
- (e) Items other than non-expendable assets should not be capitalized. If there is any discrepancy and/or items are unaccounted for, then an investigation should be done by the head office selected team to determine if there is an error in the serial number. In such case the data should be corrected in the Asset Inventory and a note should be made that it was erroneously entered with the wrong serial number. All supporting documents, such as invoices indicating serial numbers, should become part of the record.

For expendable items the Accounts & Admin Officer is responsible for keeping updated stock/register information. Manager Procurement or respective program personnel shall make random checks of the assets once every six month or as per need. Every year a complete inventory shall be made and checked randomly by the procurement manager or authorized program personnel or internal audit team.

At the end of the Asset Inventory exercise the Field/Branch/Project office/Regional Office/ District Office/Upazila Office/Department should sign the report to certify that it is accurate. With respect to vehicles, all information (e.g., model, chassis and engine numbers, year acquired, unit value) must be entered into the Asset Inventory;

3.6 Safeguarding and control of Assets

- Every Field Office/Regional Office/ District Office/ Upazila Office/Projects/Departments are also required to ensure that adequate controls are in place so that the non-expendable assets are properly maintained and safeguarded.
- It is strongly recommended that Laptops are secured with an appropriate locking cable. When a laptop is not attached to a locking cable it should be securely placed in a locked drawer or filing cabinet when not in use, even for short periods of time.
- Equipment on loan to staff members should always be recorded in the equipment log/loan records.
- Respective Accounts Officer must ensure that be recorded in the equipment log/loan records.
- Respective Accounts and Admin Manager/Officer must ensure that equipment is returned promptly prior to the staff member's reassignment or separation from service.
- When a staff member is traveling on official business, and particularly by air, the laptop should remain with the staff member and should not be placed in unaccompanied baggage.
- MF could use an asset and procurement management software for efficient control for all assets of organization. The software will be controlled by the central procurement management authority.

3.7 Insurance of asset/property for possible lose due to accident or disaster

- Insurance is the equitable transfer of the risk of a loss, from one entity to another in exchange for payment. Asset/ Property insurance provides protection against risks to asset/ property, such as fire, theft or natural disaster.
- MF will take the initiative to insure it's all assets/properties for the protection against risks either for the event of human made disaster, natural disaster and pandemic. An internal memo may be issued detailing out the procedure of insurance.

3.8 Asset Disposal

3.8.1 Disposal plan

The order of priority for disposal is:

- As directed by the donor
- Organization to use at a different location.
- Donate to other NGOs
- Donate to civil or local authority
- Sell
- Destroy

Equipment or materials no longer required for the programme or project must be disposed of in line with the following procedure.

For disposal of assets a resolution should take and approved by the Executive Director. HRM&D and Admin department with the help of respective project will prepare the resolution. The original donor of the goods must be identified, and their restrictions/instructions on disposal, if any, must be followed.

Change of ownership- After phasing out the project and if there is no obligation from donor MF management will take steps for transfer the asset from project to organization or other projects. A letter confirming the change of ownership must be issued. For computers, laptops etc. a statement stating that all software and documents have been removed should also be signed. All insurances and maintenance agreements must be cancelled before handing over assets to new owners it may be project or organization itself.

Sales- use discretion to choose a disposal procedure appropriate to the value and type of goods. Goods of a high value or a high technical specification require a more formal disposal procedure than those of little value. MF HRM&D and Admin or designated person will be responsible for this.

Sales to organization's staff- With management concern, goods may be offered for sale to staff. Interested staff members must submit sealed/open bids, as required or decided, and the sale is to be made to the highest bidder.

Sales to outside parties- sales are to be conducted by public auction or by submitting sealed bids. Sale is to be made to the highest bidder. Admin Manager/designated person will be responsible for taking necessary action.

Transfer to other organization site- at the close of project, assets that are to be transferred to other projects will require finance department consent in order for the transfer to be documented in the disposal register (with a new budget code). Normally the value will be nil since the cost of the asset has been charged against the first project. During the transfer, a signed receipt must be obtained at the time of the transfer stating:

- Date of transfer Agreement that ownership and responsibility has passed to the third party.
- A brief description of the condition of the asset including a record of any apparent defects.
- Signature of both parties

Lost/Theft

Assets/items that are either lost or destroyed in the project will require a theft/loss form to be filled in and signed off by the budget holder. A copy should be passed to Finance as well inform the respective donor. Depending on the situation, either a full payment must be made by the person responsible (if the loss/theft was due to carelessness) or waived in the event of unavoidable accident. In case of insured item, respective authority must be informed immediately.



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3.8.2. Methods of Disposal

Cash Sale: All sales of assets should be on a cash, check, or money order basis, on or before delivery.

Competitive Bidding: If the purchase value of an asset is Taka 100,000 or above, the item should be disposed of by competitive bidding.

Exemption to Bidding: If the purchase value of an item is less than Taka 100,000, MF HRM&D and Admin or designated person may be authorized for disposal of the item without competitive bidding. However, every effort should be made to allow for competitive bidding whenever possible, regardless of the value, and any exemption must be well documented.

3.8.3 Disposal Procedures

The Director is authorized to dispose of equipment with an inventory value of Taka 100,000 or more per item. He/she can give the authority to senior officer to do this job on his/her behalf.

Requests for disposal from organizational departments of individual items, which have been deemed obsolete, damaged and irreparable, or surplus to the organizational department's requirements, will be submitted by means of the Request for Assets Disposal, Theft or Transfer (RADT) Form to the Designated person for approval. (See Request for Assets Disposal, Theft or Transfer (RADT) Form).

Requests for disposal and/or write-off from organizational departments of individual items with an inventory value of Taka 100,000 or more per item, which have been deemed stolen/lost, obsolete, damaged and irreparable, or surplus to the organizational unit's requirements, will be submitted by means of the RADT form, through the Authority.

In case of inventory values less than Taka 100,000: Field Office Representatives, Program/Regional Office/ District Office/ Upazila Office/ Project Chief and the designated person may dispose of assets, by any reasonable procedure, as per written approval of Executive Director.

3.8.4 Special Procedures

Computers: Computers and computing equipment are usually disposed of every three (3) years. The preferred method of disposal for all computing equipment is by sale to staff members at a competitive price that is comparable to the market rate. MF Field Offices/ department/ project can also acquire the PCs for donation to or use in programs/projects by paying the same sale amount.

Furniture: If there is any obsolete furniture in any phase out project, the related project personnel and MF Admin will take necessary action to storage items or sale.

NOTE: Good wooden furniture should be provided to staff on the floor. Older items such as metal furniture should be removed for storage or sale.

3.8.5 Damaged, Lost, or Missing Furniture and Equipment

Each Division/project/program/field office/regional office/district office/ upazila office are required to conduct its own investigation and to complete the RADT form. The staff member to whom the equipment was assigned should also provide a written report of the investigation for missing equipment or furniture. The report and the RADT Form should be forwarded to the Administration Department.

3.8.6 Vehicles

The designated person authorized by Executive Director will be responsible to dispose of vehicles which have clocked 1 00,000 kilometers, or are Ten (10) years old from the date of purchase, whichever comes first unless it is still in good condition to run. In cases where a vehicle is not serviceable due to lack of parts, or incurs very expensive repairs, a decision may be made to replace the vehicle before it becomes obsolete. Documented justification is needed for this decision.



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SECTION 4 PROCUREMENT ETHICS

4. Procurement Ethics

4.1 MF Employees:

MF employees shall not engage in conduct resulting in a real, potential, or apparent conflict of interest. A conflict of interest may arise when any action by an employee, whether isolated, recurring, or continuous, is to the direct financial advantage of this employee, of their spouse, parent, or child. Employees shall not participate in the selection, final choice, or management of a contract covered by donor funds, if a real, potential, or apparent conflict of interest would be involved. Such a conflict of interest would arise when any employee or any member of their family, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm/organization selected for a final contract. MF employees must at all times provide full disclosure of their actions or relationships with perspective vendors, contractors, or consultants. If any family member is to be employed or contracted, then prior approval from the Director is required.

4.2 Gratuities and Gifts:

MF employees shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, sub-recipients, parties of project contractors, or entities. MF employees are, however, allowed to accept gifts at of a nominal face value not to exceed Taka 5000. As appropriate, either the Director or the Director (Finance) will be responsible for determining the disciplinary action that will be imposed for any conflict-of-interest violations.

4.3 Disciplinary Action

Violations of this Policy by Staff members will be reported to the MF Management for appropriate action. Violations of this Policy by the relevant Staff may result to disciplinary action as per MF Policy.

4.4 Risk Evaluation

- There might have risks faced during every phase of procurement, with certain risks being of greater importance, depending upon the goods or services being procured as well as the stage of the procurement.
- Procurement designated personnel along with Procurement Committee is responsible to develop practical management and operational measures to mitigate those risks.
- There are two stages of assessing and dealing with risk in procurement:

Risk Analysis: Planning stage during which Procurement personnel of MF identifies the origin, probability, and extent of the risks. Risk analysis should be part of each stage of procurement planning and should be regularly reviewed and updated.

Risk Management: Mitigates the impact of risk by reducing the likelihood of its occurrence and/or reducing avoidable consequences through planning, monitoring and other appropriate actions. When evaluating a Submission, designated procurement personnel should identify and analyze all risk factors that are likely to occur on a project and then decide on the most appropriate management response for each risk.

4.5 Remedies

- Remedies are the means by which a contractual right is enforced or by which the breach of a contractual right is prevented or compensated.
- When the Contract is not being performed properly, or Vendor Performance is otherwise unacceptable,
- The designated procurement personnel may apply such remedies as invoking liquidated damages or payment withholding provisions; drawing under Performance Security; terminating the Contract; and initiation of arbitration.

- The designated personnel of procurement shall exercise professional judgment as to the use of remedies. When considering any contractual remedy, appropriate and documented communication with the Vendor is important. The Vendor should be given an opportunity to provide evidence defending its performance. That evidence might relate to an excusable delay or impossibility of performance.

4.6 Environmental considerations

It is MF's manual to manage its business in an environmentally responsible manner. Environmental responsibility or "green" procurement is the selection of goods and services that minimize environmental impacts. MF endeavors to protect the quality and diversity of the environment and continually improve performance in this regard. This means considering the costs of securing raw materials, manufacturing, transporting, storing, handling, using and disposing of products procured.

Procedures "Green" procurement is rooted in the principle of pollution prevention, which strives to eliminate or to reduce risks to human health and the environment. In order to do so, project should evaluate purchases based on a variety of criteria, ranging from the necessity of the purchase, resource consumption, waste generation, environmental impact and health of the users.

MF's "green" procurement manual promotes the three "R" strategies:

- Re-think the requirements to reduce environmental impact.
- Reduce material consumption.
- Reduce energy consumption.

"Green" procurement at the MF requires its staff to conduct all activities, including contracting with other entities, in a resource-efficient manner. Thus, MF will be selective in its choice of products, processes, and services to promote the three "R" strategies, taking into consideration the effects of energy consumption, toxicity, ozone depletion, radiation, and the use of recycled materials.



SECTION 5 INVENTORY MANAGEMENT OF CONSUMABLES

5.1 Introduction

MF will keep minimum level stock for Day-to-day office stationery, training materials, project materials (Educational materials, Medicine, Sanitary materials, Tube well spare parts etc). All stored materials should be kept in safe, secure and good condition: Store items in a place and manner that protects them from-

- Environmental conditions such as rain, heat, humidity or cold
- Insects, rats and other animals
- Contamination from other items
- Fire (by banning smoking in storage areas and providing detection and firefighting equipment)
- Theft (by following proper security and recordkeeping procedures)

Any item must be recorded in stock register first and be issued based on requisition and acknowledgement. If materials are transferred to another office, a challan should be prepared and preserved the challan in both offices. All the returned materials must be entered in stock register.

The Stock Register will contain the following information:

- Name of the Item
- Date
- Previous Balance
- Received quantity
- Challan #
- Total Quantity
- Issued Quantity
- Challan/Memo #
- Balance
- Acknowledgement/ Recipient Signature

5.2 Inventory of Consumables

At MF inventory will be denoted as the inventory of consumable goods like printing materials, stationeries, computer accessories, refreshment items etc. MF will maintain a minimum inventory level for consumable goods as per program requirement. Major objective of inventory management is to:

- a. ensure that items do not run out in the middle of an engagement.
- b. enable MF management to buy supplies in bulk and attain the advantage of economy of scale.
- c. ensure that appropriate procurement policies are followed.

5.3 Record Keeping for Inventories

- a. Admin staff will prepare a requisition which will be in line with requisition placed by different departments or project based on their future demand for the period.
- b. As the requisition is placed, Admin personnel will prepare a list of items to be purchased and accordingly follow appropriate procurement policy to procure the items.
- c. As regards accounting of goods procured appropriate accounting procedures discussed earlier in procurement section will be followed.
- d. Admin personnel will prepare Material Receiving Report (MRR) in prescriber format and when material received from the suppliers, and he will be the custodian of all consumable goods. In his/her presence physical inventory of all consumable goods will be taken for reordering.
- e. Admin will maintain a stock register in prescribed format.
- f. Each project, section, or department will be maintained a record to keep track of their inventory.

5.4 Inventory Control Procedures

- a. Inventory should be procured within budget provision having due approval of departmental requisition.
- b. At end of the month the responsible person will reconcile the inventory between register and physical and produce a reconciliation report and share with supervisor.
- c. Monthly consumption report will be negated and share with
- d. The balance of physical inventory at the end of each month should be agreeing with the Stock Register. A committee or team must carry out at least once a year physical counting of inventory to reconcile with the stock register.
- e. For ensuring better internal control system, responsibilities should be decentralized to at least three persons to maintain the inventory in the store in the following area:
 - o Handling/Recording
 - o Purchasing/Accounting
 - o Approval

5.5 Year-end Stock Taking and Reconciliation

Year-end physical inventory of consumable stock should be conducted through a committee duly constituted by the Director and concerned Program Head/Project Head in prescribed format. A reconciliation statement of consumable stock should be prepared in case of any deficiency found during the physical visit, i.e. difference between the stock register balance and physically found quantity.

5.6 Physical verification

A physical verification must be carried out at least once in a year and that report must be submitted to the Management for approval. A Physical Inventory Committee will be formed comprising of at least three members who will verify the stock. The committee should be approved by management.

5.7 Accounting for short / excess found in physical inventory

Proper accounting adjustment should be given in the books and records for short, excess, damaged or disposed of consumable stock. Such stock should be discarded from the stock register.



Period Covered :

Items description	Unit type	Total unit	Unit rate	Total Estimated Amount	Timeline								Procurement Method	Responsibilities	Project#	Remark		
					1st Quarter		2nd quarter		3rd quarter		4th quarter							
					Qty	Amount	Qty	Amount	Qty	Amount	Qty	Amount						
				-														
				-														
				-														
				-														
				-														
Total Cost																		

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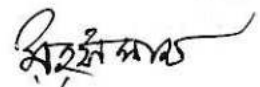




Mukti Foundation
MUKTI FOUNDATION (MF)
PURCHASE REQUEST (PR)

PR #:	
DATE:	

Requested by:		Date:			
				Signature	
Recommended by:		Date:			
				Signature	
Approved by:		Date:			
				Signature	
SL #	Description	QTY. Req.	QTY. In Hand	Unit Cost	Budgeted Cost (BDT)
1					
2					
TOTAL:					
REMARKS:					
PURCHASED BY:			RECEIVED BY:		
DATE:			DATE:		
NAME:			NAME:		

Annexure - 3: Request for Quotation form

Date:

To
Name and address of the bona-fide supplier

Subject: Request for Quotation (RFQ)/Invitation of Quotation for

Dear Madam / Sir

XYZ is a development organization/national NGO which is committed to sustainable development through qualitative changes in the lives of the poor and marginalized peoples their families and communities.

X intends to purchase The details specifications of are follows (suppose its computer)

Brand:	Date:
Processor	
HDD	
DVD R/W	
Monitor	
Z Years Warranty.	Date:

We request you to submit your offer with sealed cover on or beforedate and time.

Terms and conditions:

- 1) Any incomplete quotation will not accept by X.
- 2) Successful bidder shall deliver the mentioned items in right quantities & condition at head office X Bangladesh.
- 3) Successful bidder shall ensure the delivery of mentioned items within **2 days** upon receiving the Purchase Order from X.
- 4) Payment shall be made after certified by X department.
- 5) Payment will be made vide crossed cheque in favor of your Firm.
- 6) TAX & VAT will be deducted as per Bangladesh Govt. rules & regulation.

X reserves the right to accept or reject your offer without assigning any reason.

Thanking you,

Name:
Designation:
Name of the Organization:

RECEIVED BY		PURCHASE ORDER	
DATE:		DATE:	
NAME:		NAME:	



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(Handwritten signature)



Comparative Statement

Sl#	Name/Specification of Items	Quantity	Quotation Particulars					
			Supplier M/S XXXX		Supplier M/S YYYY		Supplier M/S ZZZ	
			Rate	Taka	Rate	Taka	Rate	Taka
1								
2								
3								
4								
5								
6								
7								
	Total							

Recommended to M/S.....for supplying items mentioned above/ items sl.#..... for the following reasons:

- 1.
- 2.
- 3.

Name and Signature with Date of Purchase Committee Members:

Name:	Name:	Name:
Designation:	Designation:	Designation:
Signature:	Signature:	Signature:
Date:	Date:	Date:

Approved by:

Name:
 Designation:
 Signature:
 Date:



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Annexure - 5: Sample of work order



PURCHASE ORDER

-

No.: _____

(pre-numbered)

Ship to above address unless otherwise specified

Selected Vendor's Name and Address	
-------------------------------------------	--

Order date:

Required date:

Following your offer / quotation dated you are advised to supply and install the bellow mentioned materials to

Quantity	Particulars of Ordered items	Unit cost Taka	Total Taka
01.			
02			
Total tk. in word			-

Signature:

(Authorized Representative)

Terms and conditions

1. All materials received by us will be subject to our inspection prior to acceptance. Rejected materials will be carried by you at your own expenses.
2. If for any reason delivery cannot be made within specified date, the supplier should communicate about the delay in writing before required date. Failing which the purchaser has the option to reject/cancel (partial or full) the purchase Order without any obligation.
3. This Purchase Order shall be construed pursuant to the laws of Bangladesh.
4. Payment will be made only the materials received by MF. Tax and VAT, if any, required by the Government of Bangladesh will be deducted at source and deducted Tax/VAT will be deposited by Plan to the Government of Bangladesh.
5. MF reserves the right to cancel the Order by giving ____ days notice, without assigning any reason.

.....
(Signature of Supplier as acceptance)



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Annexure - 6: Vendor enlistment form



Particulars of enlisted vendors

Vendor for product _____

Sl	Name & Address of Travel Agent	Physical Existence	Floor Space	Trade License	VAT Re.	Give details if owner has same business in others name	Work Experience with Plan	Antiterrorism Compliance	Work experience with others	Remarks
1										
2										
3										
4										
5										

Name, Designation, Signature and Date of Purchase Committee Members and Approver:

Member:

Member:

Member:

Approved By:



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Annexure - 7: Goods Receipt Note (GRN)



Supplier's Name & Address:				GRN No.:	
				Date:	
				Purchase Order Ref.:	
Sl. #	Description/Specification of Items Received	Quantity Ordered	Received Quantity	L.F.	Remarks
Received By:			Authorized By:		

Note: Use GRN format shown above, or the stamp shown below to ensure receipt of goods as per order.

Name of the Project

RECEIVED

Goods/Services Satisfactorily

Name:.....



[Handwritten signature]

[Handwritten signature]



SUPPLIER PERFORMANCE EVALUATION SHEET

Name of Supplier _____
Duration of Engagement _____
Project Title _____
Brief Description of Work _____

Description	Poor(1)	Fair(2)	Satisfactory(3)	Good(4)	Excellent(5)
1 Job Knowledge					
Comments:					
2 Work Quality					
Comments:					
3 Delivery on time					
Comments:					
4 Quality of work					
Comments:					
Other Comments:					

Evaluated by : _____

Date of Evaluation: _____





Delivery Challan/ Asset Transfer Form

To.....		SL #		
From.....		Date.....		
SI #	Name of Item/ Specifications	Quantity	Amount Tk	Remarks
Total				

Issued by:

Date:

Received by:

Date:

Approved by:

Date:



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Annexure - 10: Asset sold/theft report Form.

MISSING, DAMAGED OR STOLEN PROPERTY REPORT

NOTE: If property has been stolen or is lost, destroyed or damaged as a result of negligence, this form should be completed and sent to the MF Head Office within 72 hours of the occurrence.

Name of Organization	Name of Project
----------------------	-----------------

Place of occurrence			
Name of project office with detail address			
Police agency notified	Police report number	Asset identification no	Estimated value date of loss

Serial Number(s) of Asset	Purchase date	Purchase value	Description of asset	Location

Person responsible for asset	Project Manager Name	Phone number of manager
------------------------------	----------------------	-------------------------

Report in detail (including what security measures were in place at the time)






Form of Request for Fixed Asset Disposal

Organization _____ Unit/Project _____

DISPOSAL/INTERNAL TRANSFER/GIFTED/SALE (delete as appropriate)

Details:

1. Description of Item(s):
2. Identification Number:
3. Date of Purchase:
4. Purchase Price:
5. Reason for Disposal:
(Please be specific)
6. Proposed Method of Disposal.....
7. Suggested Disposal Value:
8. Expected date of Disposal:

Member of staff (s) responsible for Disposal:

Signed

(Print name)

Unit/Project Manager approved/Signed

(Print name)

Approved by

Signed



[Handwritten initials]

[Handwritten signature]

PART 2 (After disposal)

For recipient/Buyer's

I confirm the following:

- (a) the equipment is second hand and that the price has been reduced accordingly;
- (b) I accept the equipment as it is, and the organization is not providing me with any warranty that the equipment functions properly or at all or that it is fit for any particular purpose (even if I have informed them of this purpose), that the equipment might not comply with the specification printed on it or that components may have been added or removed;
- (c) the manufacturer's warranty may have expired already;
- (d) I am over 18 and a person competent to receive the equipment;
- (e) I will comply with all Health, Safety and Environmental and other issues relevant to the equipment and that, in transferring such equipment to me, the organization has no liability for the disposal, recycling or destruction of such equipment and that I will dispose of or recycle such equipment responsibly when I have finished with it.

Recipient/Buyer's Signature

Name of Recipient/Buyer
(Please print)

Address

Signature

Position

Date

Copy to be retained by disposing office/project office to Administration Department.



A handwritten signature in black ink, appearing to be a stylized set of initials or a name.

A handwritten signature in black ink, appearing to be a name in Devanagari script.