
PURCHASING & COMPETITIVE TENDERING POLICY



RAEDWALD
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PURCHASING & COMPETITIVE TENDERING POLICY

Person responsible for this policy:	Angela Ransby
Policy author:	Debbie Spencer
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CEO Signature:	Angela Ransby
Trust Board Signature:	Roger Fern

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1. Statement

This Policy is in conjunction with the Finance Policy for Raedwald Trust.

2. Background

The majority of purchases made by academies will be paid for with public funds. As public bodies, academy trusts must ensure regularity, propriety and value for money in their management of public funds.

Purchase level	Procedure
Less than £1,500	A price must always be obtained prior to any order being placed. Evidence attached if quotes have been sought – consideration to be given to alternative suppliers.
Between £1,500 and £5,000	At least two written or verbal quotations should be obtained prior to any order being placed. These should be attached to the purchase order and filed alongside the rationale for selecting the chosen supplier. Except a. where a service is being provided by a contractor to maintain or extend systems they have previously installed or are under contract to maintain. b. Have provided quotes and tenders for a similar service within the past 12 months where they were the selected supplier.
Over £5,000 but less than 15,000	At least 2 written quotations to be obtained and attached to the purchase except a. where a service is being provided by a contractor to maintain or extend systems they have previously installed or are under contract to maintain. b. Have provided quotes and tenders for a similar service within the past 12 months where they were the selected supplier.
Orders over £15,000 but less than £25,000	At least 3 written quotations to be obtained and details to be attached to order.
Orders over £25,000 to £50,000	A minimum of 3 formal quotations to be obtained in writing by a specified date and

	based on a written specification and evidence attached to order.
Over £50,000 to OJEU threshold	Goods or services ordered over £50k must be subject to formal tendering procedure. All paperwork to be kept at Trust office.
Above the OJEU threshold (currently £189,330 for goods, £4,733,252 for works & £189,330 for most services. Some services are covered by the "light touch regime" & have a threshold of £663,540)	Subject to a formal OJEU tendering process.

3. Tendering for Purchases of £50,000 and Above

3.1 Open, restricted and negotiated tenders are all acceptable CEO to agree the best approach for the project.

3.2 Full consideration should be given to the objective of the project, the overall requirements of the academy, the technical skills that may be required, any after sales service and the form of any contract.

3.3 Bidders could be asked to suggest how they would address a problem as opposed to being restricted to one solution.

3.4 Like should always be compared with like.

3.5 All invitations to tender (ITT) must include the background of the project, the project scope and objectives, technical requirements, project implementation, terms and conditions, the form of response, the tender assessment criteria and a reference number. They should also state the date and time by which the tender should be received.

3.6 All interested tenderers must be provided with the same information and the same opportunity to visit the site if a site visit is considered necessary.

3.7 Tenders should always be sent to the Trust office.

3.8 Tenders should be submitted in plain envelopes clearly marked "TENDER" alongside the ITT reference number. Tenders will be time and date stamped on receipt and stored in a secure place

prior to opening. Tenders received after the deadline will not normally be accepted.

3.9 All tenders submitted will be opened at the same time and the tender details will be recorded. These details will include the names of the companies submitting tenders, the amount tendered and will be signed by the people present at the tender opening.

4. Contracts in Formal Tender Process

Three people should be present at the tender opening.

Contracts above the OJEU Threshold (currently £189,330 for goods, £4,733,252 for works & £189,330 for most services. Some services are covered by the “light touch regime” & have a threshold of £663,540)

5. Important Notes

All interests, business and otherwise should be declared prior to tender evaluation. If there is a potential conflict of interest then that person must withdraw from the tender process and be replaced by a suitable substitute from the Trustees. Gifts or hospitality must not be accepted from potential suppliers during the tendering process.

The evaluation process should include those present at the tender opening, unless a conflict of interest is identified.

Tenders should be assessed using the tender assessment criteria published in the ITT and full records of the assessment should be kept. A report should be prepared for the Finance, Resources & Audit Committee highlighting the issues and recommending a decision.

The Department for Education’s approval must be obtained where required prior to the acceptance of a tender.

The accepted tender should be the one that is economically most advantageous to the academy and to Trust.

All tenderers should be informed of the decision.

EU public procurement Directives have been incorporated into English law and therefore will continue to apply automatically following the end of the transition period on 31 December 2020 unless and

until the UK government seeks to amend them