

All Saints' Trust

COMPETITIVE TENDERING POLICY

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1. Policy Statement

1.1 This policy is subject to the published Equality Information, in line with the Equality Duty 2011 and is underpinned by the Christian beliefs and values of our Trust.

2. Background

2.1 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.

2.2 Budget holders must be informed of the budget available to them as soon as possible after the start of the academic year. It is the responsibility of the budget holder to manage the budget and to ensure that the funds available are not overspent.

Purchase level	Procedure
Less than £5,000	A price must always be obtained prior to any order being placed. This price should be attached to the purchase order and filed.
Between £5,000 and less than £10,000	At least three 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.
Between £10,000 and £25,000	As above, however at least three written quotations should be obtained prior to any order being placed.
Over £25,000 and below OJEU threshold	Full Governing Body and Trust Board authorisation must be granted for spending in this range and the tender process outlined below must be followed.
Above the OJEU threshold (please see Appendix A)	The academy will seek external specialist guidance and support on all OJEU qualifying procurement activities.

3. Tendering for purchases of £10,000 and above

3.1 Open, restricted and negotiated tenders are all acceptable.

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 Bursar at the school address.

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 up to £25,000

4.1 Three people should be present at the tender opening. These must be:

- The budget holder
- The Bursar
- The academy Headteacher

5. Contracts of £25,000 or higher

5.1 Three people should be present at the tender opening. These must be:

- The Bursar
- The academy Headteacher

- A member of the Board of Directors

6. Contracts over £25,000 or above the OJEU threshold

6.1 For items / contracts **over £25,000**; Full Governing Body authorisation must be granted for spending in this range and the tendering process below must be followed, following references instructions for 'higher value' purchases.

6.2 Contracts above the OJEU threshold - The European public contracts directive (2004/18/EC) applies to public authorities including, amongst others government departments, local authorities and NHS Authorities and Trusts. The directives set out detailed procedures for the award of contracts whose value equals or exceeds specific thresholds.

The school will seek external specialist guidance and support on all OJEU – qualifying procurement activities.

6.3 Tendering Process

- a. A list of requirements for the purchase must be produced or for higher value projects a Project Initiation document and business case should be compiled including a specification, consideration of the impact of issues e.g. environmental.
- b. Criteria for scoring quotes / tenders should be set. The criteria need not relate solely to price as for example local supply and sustainability considerations are valid criteria.
- c. A request for quotes / Invitation to Tender (ITT) should be put together and sent to prospective suppliers.
- d. Any questions raised by potential suppliers should be circulated to all potential suppliers.
- e. Once quotes are received they should be evaluated and scored against the predetermined criteria.
- f. A decision should be made the reasons behind it should be detailed in a report.
- g. A letter should be sent to unsuccessful suppliers. In higher value projects suppliers should be offered an opportunity to discuss reasons why their tender was unsuccessful.
- h. The Bursar should be informed and the order placed on relevant financial systems.
- i. The necessary insurance and other related documentation should be in evidence and the asset register and any further documentation should be updated as necessary.
- j. In higher value projects the contract signature and guidance processes must be followed in order to obtain signed contracts and issue an acceptance letter.
- k. Contract compliance and control procedures guidance should be used in higher value purchases to manage the contract performance against the agreed Key Performance Indicators.
- l. Checks should be made to ensure goods, works or services received match the requirements before payments.
- m. The correct segregation of duties must be maintained at all times.

Appendix A
OJEU Thresholds

Details of the thresholds, applying from 1st January 2016 are given below. Thresholds are net of VAT.

	SUPPLIES	SERVICES	WORKS
Entities listed by Crown Commercial Services	£164,176	£164,176	£104,394
Small lots	£62,842	£62,842	£785,530