



PROCUREMENT AND TENDERING POLICY

Reviewed by the Local Governing Body: **Spring 2025**

To be reviewed: **Every 3 Years**

Next review: **Spring 2028**

Date Approved by the Genesis Education Trust Board: **Spring 2025**

** Executive Head/ Head Teacher/Head of School/Associate Head (henceforth referred collectively as Head Teacher, unless specifically stated)*

GENESIS EDUCATION TRUST PROCUREMENT & TENDERING POLICY

Where appropriate the Trust should always follow the DfE approved framework agreements for school to buy goods and services.

Frameworks help to procure good and services from a list of pre-approved suppliers, with agreed terms and conditions and legal protections.

The framework also run tenders to select the right supplier to provide specific goods and services

The Trust follows the procurement values as follows:

- Low is under £10,000
- Medium is £10,000 to £50,000
- High is £50,000+

Please note that examples of where purchase orders are not required are as follows :

- *Utilities*
- *Ad-hoc Agency supply staff to cover same day sickness or absence*
- *Parentpay charges*
- *Payments for disadvantaged families in urgent need*
- *Photocopier/telephone/mobile usage (plus wider items where services are not optional, are not a material cost, and cannot be reliability measured)*

QUOTATION AND TENDERING

The minimum required numbers of tenders or quotations from appropriate contractors for a given estimated value of contract are:

- £1,001 - £10,000 at least two informal quotations:
- £10,001 and up to £25,000, minimum of three written quotations
- Above £25,001 and up to £50,000 three written quotations to be submitted in writing by a specified date and time and based on a written specification and evaluation criteria and approval by the Trust Board;
- Above £50,000 - Formal tendering process, including advertising in FTS (Find a Tender) and must following the Public Procurement (Amendment etc) (EU Exit) Regulations 2020 with particular regard given to the timescale for such tender if appropriate

The values are for single items or groups of items, which must not be disaggregated artificially.

The current UK procurement thresholds are as follows:

Works: £5,372,609 (including VAT)
Services or Goods: £214,904 (including VAT)

PROCEDURES

1. Purchases with a value higher than £25,001 and lower than £50,000 a specification will be prepared, authorised by the chair of the finance committee and sent to at least three suppliers from the DfE framework. It is anticipated that for any major building works of a value greater than £25,000 the services of architects would be engaged to deal with the handling of specifications and suitability to tender.
2. The invitations to tender will include:
 - (a) an introduction/background to the project;
 - (b) the scope and objectives of the project;
 - (c) any technical requirements;
 - (d) implementation details for the project;
 - (e) the terms and conditions of the tender; and
 - (f) the form and date of response to the academy, or in the case of building works, to the architect or quantity surveyor.
3. All replies, if to the school, should be addressed to the Chief Operations Officer in a plain sealed envelope marked 'Tender' to reach him/her by a specified date. All replies must be kept sealed until that date and passed to the chair of the relevant committee.
4. All tenders will be opened at the same time and details of the contractor, quotation and any other details recorded at the time of opening,
5. No contractor will be allowed to amend the tender after the time fixed for receipt.
6. The Chief Operations Officer will open a separate correspondence file for each tender which will contain copies of all correspondence or other relevant information.
7. For purchases up to £25,000, provided the expenditure is included in the budget, the decision as to which tender to accept will be taken by the Chief Executive Officer, in consultation with the Chief Operations Officer and the chair of Finance Committee.
8. For purchases exceeding £25,000, provided the expenditure has been budgeted for, a decision will be recommended by the GET Finance committee. The decision will need to be ratified by the GET Board.
9. Where expenditure is not included in the budget or anticipated expenditure exceeds the budget allocation, the decision as to which tender to accept will be taken by the finance committee, in line with their terms of reference and then ratified by the full Board; and
10. The reasons for accepting a particular tender must be documented, especially if it is decided to accept other than the lowest tender. All decisions must be reported to the full governing body.

ACCEPTANCE OF TENDER

The following points will be considered when deciding which tender to accept:

1. The overall price and the individual items or services which make up that price.
2. Whether there are any 'hidden' costs; that is additional costs which the academy will have to incur to obtain a satisfactory product.
3. Whether there is scope for negotiation, while being fair to all tenderers.
4. The qualifications and experience of the supplier, including membership of professional associations.
5. Compliance with the technical requirements laid down by the school.
6. Whether it is possible to obtain certificates of quantity.
7. The supplier's own quality control procedure; pre sales demonstrations, after sales service and, for building works, a six month defects period and insurance guarantees.
8. The financial status of the supplier.
9. References from other establishments.
10. Understanding & compliance with Health & safety, CDM regulations and Child Protection issues related to working on a school site

In the case of building works, where the tendering process is being carried out by the architect or quantity surveyor, they will be responsible for checking the documents of the lowest tender before making a recommendation to the Trust.

Once a tender is accepted an order should be issued immediately to the supplier in the normal way.

RELATED PARTY TRANSACTIONS

Related party transactions must be monitored and scrutinised by the finance committee prior to approval being made. The internal register of interests will be shared with members of staff and the board members with authority to approve purchases. All known related parties will also be marked within the finance system before making approval.

The successful contractor should be informed that the school is a NON SMOKING site

The Schools' Funding Agreement should be considered when applying this policy