



Competitive Tendering Policy

QUOTATION AND TENDERING

A quotation or price comparison for potential purchases must always be obtained before any order is placed to ensure that best value is achieved. The minimum required numbers of tenders or quotations from appropriate contractors for a given estimated value of contract are:

- Up to £2,500 1 written or verbal quotation to be documented. If via an approved catalogue, clear reference to the item needs to be made on the order form.
- Above £2,500 and up to £10,000, three written quotations requested with a documented rationale for the decision made;
- Above £10,000 and up to £25,000, three formal written quotations are required (as a minimum) with a documented rationale for the decision made;
- Items over £25,000 to be formally tendered with approval of the tendering process needed in writing on company headed paper, quotations to be submitted in writing by a specified date and time and based on a written specification and evaluation criteria;
- Above EU thresholds require advertising for tender and awarding such tender

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

The directives set out detailed procedures for the award of contracts whose value equals or exceeds specific thresholds. Details of the thresholds, applying from 1st January 2016 are given below. Thresholds are net of VAT.

	Supply, Services ¹ and Design Contracts	Works Contracts ²	Social and other specific services ³
Central Government ⁴	£106,047 €135,000	£4,104,394 €5,225,000	£589,148 €750,000
Other contracting authorities	£164,176 €209,000	£4,104,394 €5,225,000	£589,148 €750,000
Small Lots	£62,842 €84,000	£785,530 €1,000,000	n/a

¹With the exception of the following services which have different thresholds or are exempt:

- Social and other specific services (subject to the light touch regime) Article 74.
- Subsidised services contracts specified under Article 15.
- Research and development services under Article 14 (specified CPV codes are exempt).

²With the exception of subsidised works contracts specified under Article 13.

³As per Article 74. Services are listed in Annex XIV. Applying in Scotland from March 2016.

⁴Schedule 1 of the Public Contracts Regulations lists the Central Government Bodies subject to the WTO GPA. These thresholds will also apply to any successor bodies.

For tenders expected to exceed EU thresholds, advertisements must also be placed in OJEU (the Official Journal of the European Union) and must follow EU procurement requirements with particular regard to be given to the timescale for such tenders.

The successful contractor should be informed that the Academy is a NON SMOKING site and in the case of building and maintenance work must receive and complete the contracts pack before beginning work on-site.

PROCEDURES

All purchases with a value greater than £25,000 must be put out to formal tender. The following procedures must be followed in such circumstances:

1. A specification will be prepared, authorised by the chair of the Finance and Audit committee and Head of School of the relevant Academy or CEO if for the Trust, and sent to at least three suppliers. It is anticipated that for any major building works of a value greater than £15,000 the services of an architect or project manager would be engaged to deal with the handling of specifications and suitability to tender.
2. Where appropriate, the suppliers invited to tender should be drawn from an approved list or from those agreed with the architect/project manager. Otherwise, invitations to submit tenders will be advertised in local newspapers and trade journals **if appropriate**. 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 project manager.
3. All replies, if to the Academy itself, should be addressed to the Business Manager or Senior Financial 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.
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 Business Manager or Senior Financial 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 £49,999, provided the expenditure is included in the budget, the decision as to which tender to accept will be taken by the Local Governing Body for the Academy, in consultation with the Business Manager/Senior Financial Officer and the chair of Finance & Audit Committee.
8. For purchases exceeding £50,000, provided the expenditure has been budgeted for, a decision will be recommended to the Board of Trustees by the Finance & Audit Committee. The decision of the Board will need to be reported to the full governing body of the individual Academy.
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 Board up to £150,000 and

the board and Audit Committee over £150,000 and then the decision shall be reported to the full governing body of the individual academy; 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 Academy.
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 project manager, they will be responsible for checking the documents of the lowest tender before making a recommendation to the academy.

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

The successful contractor should be informed that the Academy is a NON SMOKING site and in the case of building work must receive and complete the **contracts pack** before beginning work on-site.

This Policy will be reviewed by the Finance & Audit Committee on a 3-yearly cycle and must be signed by the Chair of the Board and Chief Executive Officer.

Chief Executive Officer:		Date:	28.11.2017
Chair of the Board:		Date:	28.11.2017