



PROCUREMENT AND TENDERING POLICY

Reviewed by the Local Governing Body: **Spring 2019**

To be reviewed: **Every 3 Years**

Next review: **Spring 2022**

Date Approved by the Genesis Education Trust Board: **Spring 2019**

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

GENESIS EDUCATION TRUST PROCUREMENT & TENDERING POLICY

QUOTATION AND TENDERING

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

- Above £1,000 and up to £5,000 three oral quotations:
- Above £5,001 (£5,000 for works) and up to £10,000, three written quotations;
- Above £10,001 and up to £25,000, 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 and up to EU thresholds, three tenders;

Over EU thresholds, five tenders. (approval from the Trust Board recommended by the Finance Sub-Committee and the CEO)

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

The sterling equivalents of EU thresholds (net of VAT) are £173,934 from 1/1/12 for supplies and Part A services and £4,348,350 from 1/1/12 for works. The sterling equivalents are changed on 1 January of each even-dated year.

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.

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 relevant committee and Headteacher and sent to at least three suppliers. 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. Where appropriate, the suppliers invited to tender should be drawn from an approved list **or** from those agreed with the architect. 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 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 governing body; 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.

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