



SIR ROBERT PATTINSON ACADEMY

PURCHASING POLICY

Date Reviewed in School:	September 2023
Date Approved by Trustees:	25 September 2023
Review Date:	September 2026

PURCHASING POLICY

It is recognised that in all purchasing decisions, it is important to compare prices and choose the most appropriate supplier.

If a particular supplier is not offering the cheapest option, there should be an explanation as to why they have been chosen. It may be that from a Best Value point of view, they offer something within the supply that is valuable but not necessarily of a monetary nature.

As a general rule, it is recognised that ESPO offer quality goods at a competitive price so they would be an appropriate supplier against which to measure other providers.

Requests for purchases can be generated through approvalmax or for a card purchase on a purchase order form. These should be approved by the budget holder. Verbal orders should not be placed except with prior consent obtained via the Business Manager or the Headteacher. Single orders over the value of £10,000 should be countersigned by the Headteacher.

Unless the amount requires formal approval by the Tender Committee and the Governing Body as described below, authority is delegated to the Headteacher or whoever is designated a budget holder by them.

The procedures to be followed governed by the value of orders are as follows:

1. Single orders up to the value of £1000 – should be authorised by the Budget Holder.
2. Single orders over £1000 and up to the value of £10000 –should be authorised by the budget holder and Business Manager
3. Single orders over £10000 and up to the value of £25000 – should be authorised by the Business Manager and Headteacher. three independent prices, wherever practicable, have been obtained and retained.
4. Single orders over the value of £25000 and up to the value £75000 – the Audit and Compliance Committee has the option of obtaining quotations or tenders. For contracts at the higher level of the band, tendering may be more appropriate. These will be considered and the supplier approved/appointed by the Board of Trustees.
5. Orders over the value of £75000 the formal tender process should be followed. The procedure described in the following Tender Policy applies where the value of a contract is likely to exceed £75000. Exceptions to this are permitted for contract renewal or cases where there are insufficient agencies offering the product in question. Frameworks can be used as an alternative or a consultant to complete the tendering process on behalf of the Academy.

Can you get what you need through a framework agreement?

↓ Yes

Check terms of agreement

The framework will say if you can choose the supplier without running a mini competition

Run a mini competition

1. Comply terms of framework agreement
2. Decide how you'll assess bids, following any framework rules
3. Decide level of service you want
4. Decide if you want to run an expression of interest process
5. Send invitation to tender to all suppliers who can provide what you need
6. Fairly assess all bids
7. Choose supplier that offers best value for money

Select the supplier from a list

Research the market and get quotes from at least 3 suppliers

1. Decide how you will assess the bids
2. Get quotes from at least 3 suppliers
3. Assess all the quotes you get fairly
4. Choose the supplier that offers best value for money

↓ No

Establish the value of your contract

(Check with your school, trust or authority for different low or medium value thresholds)

Low to medium value (£40k or less)

High value (over £40k, but less than the public contracts regulations (PCR) procurement thresholds)

Seek legal advice

Run your own buying process

1. Assess the market
2. Prepare your contract and tender your documents
3. Advertise in the right places
4. Think about using an expression of interest to cut the number of bids you'll need to assess later
5. Send an invitation to tender to people who reply to your advert
6. Fairly assess all bids you get, using same criteria and process
7. Choose bid that offers best value for money
8. Award contract to highest scoring bidder

Above the PCR procurement thresholds

Goods – £213,477
Works – £5,336,937
Most services – £213,477
Some services are covered by 'light touch regime' and have threshold of £663,540

Seek legal advice

Use PCR-compliant bidding process