



PUCHASING & 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 Academy 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 £1,000	A price must always be obtained prior to any order being placed. This price should be attached to the purchase order and filed.
Between £1,000 and less than £10,000	At least three written 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.
£10,000 and above	Subject to a formal tendering process. Please see below and contact the PDET Business Director for support.
Above the OJEU threshold (currently £172,514)	<p>Subject to a formal OJEU tendering process. Please see below and contact the PDET Business Director for support.</p> <p>If PDET academies wish to enter into multiple contracts to fulfil the same requirement, then the value of those contracts will be aggregated together to decide whether it crosses the threshold. The rules are very specific about this: when offering public sector tenders contractors must not enter into separate contracts below the thresholds in order to avoid having to apply the regulations.</p>

- 2.3 Please note that a series of purchases from a single supplier in a single academic year contribute towards that purchase level. Therefore, if an academy places multiple orders with a single supplier and the total purchase level exceeds £1,000 then evidence will need to be provided to demonstrate the rationale for selecting the chosen supplier

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

- 3.1 Open, restricted and negotiated tenders are all acceptable, please contact the PDET Business Director to discuss and agree the best approach for your project.
- 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 Business Director, Peterborough Diocese Education Trust, Bouverie Court, The Lakes, Bedford Road, Northampton, NN4 7YD.
- 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, academy Business Manager or a member of the senior leadership team
- The PDET Business Director
- The academy Headteacher

5. Contracts of £25,000 or higher

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

- The PDET Business Director
- The academy Headteacher
- A member of the PDET Board of Directors

6. Contracts above the OJEU threshold (currently £172,514)

6.1 It is crucial that you consult the PDET Business Director prior to embarking on any procurement.

7. Important Notes

7.1 All interests, business and otherwise should be declared prior to tender evaluation. If there is a potential conflict of interest then that person must withdraw from the tender process and be replaced by a suitable substitute from the PDET Board of Directors. Gifts or hospitality must not be accepted from potential suppliers during the tendering process.

7.2 The evaluation process should include those present at the tender opening, unless a conflict of interest is identified.

7.3 Tenders should be assessed using the tender assessment criteria published in the ITT and full records of the assessment should be kept. A report should be prepared for the PDET Business Director highlighted the issues and recommending a decision. The PDET Business Director is responsible for the acceptance of a tender.

7.4 The Department for Education's approval must be obtained where required prior to the acceptance of a tender.

7.5 The accepted tender should be the one that is economically most advantageous to the academy and to PDET.

7.6 All tenderers should be informed of the decision.