

Wadebridge School



FINANCE POLICY

Appendix 3

August 2025

Document Governance	
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Version	2.0
Last Review Date	August 2025
Next Review Date	Summer 2026
Published to Website	September 2025
Distribution	This policy and its contents are made available to all Wadebridge School Staff and observed by all Trustees

WADEBRIDGE SCHOOL PROCUREMENT POLICY

BEST VALUE AND VALUE FOR MONEY

The Trustees and all staff will apply the principles of best value and value for money to school related procurement.

All procurement must follow the requirements of the Wadebridge School Scheme of Delegation and Finance Policy and this Procurement Policy.

Best Value

Compare

The Trustees and management of Wadebridge School will benchmark the school's performance and results against other similar local school and national schools in order to evaluate previous decisions and existing implications.

Consult

Consultation will take place with all relevant stakeholders prior to any relevant purchases or changes which have a resulting financial impact to the budget in order to ensure that informed and effective decisions are made. The relevant stakeholders will be consulted as and when existing provisions and practices are reviewed.

Compete

Wadebridge School Trustees and staff will ensure that efficient and effective goods and services are secured for the school, measured by high standards and competitive prices. Fair competition will be ensured wherever this is practical. All procurement legislation will be adhered to.

Challenge

Services are to be reviewed and monitored:

- Are they still required?
- Can the service be delivered differently – adjusted to the changes within the school and education provision?

Collaborate

The school will, where applicable, collaborate with other schools when procuring services (eg through Business Manager, Curriculum Leader, Network Manager and other networks).

Value for Money (VfM)

The Trustees and staff of Wadebridge School will maximise the impact of each procurement to ensure the best possible outcomes for our students and staff.

Procurement decisions will be informed by current requirements, costs, results and the input of relevant stakeholders.

The requirements of this Procurement Policy apply in particular to:

- staffing
- use of premises
- use of resources

- quality of teaching
- quality of learning
- purchasing
- pupils' welfare
- health and safety

Staffing:

Trustees and the School Leadership Team (SLT) will produce a staff structure that provides best value in terms of quality of teaching and learning, as well as addressing the whole school objectives.

Use of Premises:

Trustees and SLT will consider the most appropriate use of teaching areas, support areas and communal areas in order to provide the best possible environment for teaching & learning and support provision.

Use of Resources:

Trustees and SLT will decide on the most appropriate way of deploying equipment, materials and services in order to provide pupils and staff with resources which best support the quality of teaching and learning.

The school will allow the use of the school site outside of school hours, where the use does not impact adversely on the budget, the needs of the school or school resources (including staffing).

Teaching:

Trustees and SLT will review the quality of curriculum provision and the quality of teaching, in order to provide parents and pupils with:

- A curriculum which meets the requirements of the National Curriculum.
- Teaching which builds on previous learning and has high expectations of our student's achievement.

Learning:

Trustees through the school leaders will review the quality of children's learning, to provide teaching which enables children to achieve nationally expected progress and meet locally set targets.

Purchasing:

Trustees and SLT will develop procedures for assessing need and obtaining goods and services which provide "best value" in terms of suitability, efficiency, time, and cost.

Students' Welfare:

Trustees and SLT will review the quality of the school environment and the school ethos, in order to provide a supportive environment conducive to learning and recreation.

Health & Safety:

Trustees and SLT will ensure that regular reviews of the school environment, procedures, equipment and risk assessments are all carried out, in order to provide a safe working environment for pupils, staff and visitors.

Monitoring:

These areas will be monitored for best value by:

- In-house monitoring by the Headteacher, SLT, Curriculum Area Leaders (CALs) and other Leaders within school e.g. classroom practice, work sampling
- Annual Performance Management target setting meetings.
- Annual Budget Planning.
- Weekly update and business meetings between the Headteacher and individual members of the SLT consulting on their individual areas of responsibility.
- Analyses of school pupil performance data.
- Inspections of financial data provided by auditors and appropriately qualified external providers.
- OFSTED Inspection reports.
- Regular classroom observations by the SLT and CALs.
- Analysis of DfE pupil performance data.
- Trustee visits.
- Trustee committee meetings.

1/ Please refer to the following documents:

- Wadebridge School Scheme of Delegation and Finance Policy (all budget holders need to be acquainted with this document)
- DfE 'Buying for Schools' guidance.

2/ The following must be considered before the procurement process is started:

- Are the goods and services actually required by the school and 'fit for purpose'? Consider the school priorities detailed in the School Development Plan.
- Leases that are entered into must be in accordance with ATH and also be notified to Trustees at the earliest opportunity. Leases must be entered into under the criteria stated within the Scheme of Delegation and Finance Policy.
- Is there a budget available for this proposed purchase and has appropriate authority been granted to proceed?
- Could goods or equipment be borrowed from another school for a 'one off' or infrequent use?
- Is there a purchasing framework in place (eg Government purchasing portal) and if so are their prices competitive with individual suppliers? NB in the case of premises related works, the frameworks are not necessarily better value than individual contractors. Local support in the case of emergencies must be considered.
- Will TUPE apply? If so legal / expert advice must be sought as this may need to be treated as a high value procurement.
- Consider, with the price, the on-going cost to the school that the proposed purchase may generate:
 - Servicing and maintenance.
 - Annual charges (eg operating lease, impact on the budget).
 - Consumables required.
 - In house management required.
 - Environmental sustainability / disposal cost at end of life.
 - After sales service?
- Care must be taken with orders for works and services which should have accompanying detailed specifications, particularly for premises related works. This will ensure against extra costs arising and variation orders. Other legislation may need to be satisfied before a works related contract is agreed.

- Professional consultancy support is recommended for the letting of cleaning and catering contracts.
- Orders for emergency works may not exactly follow the process agreed below as this would not be practical, however every effort should be made to ensure that the procurement is documented and the choice of contractor is seen to be a fair and reasonable decision.
- Establish the risks surrounding any procurement and establish how they will be managed.
- In the case of medium or large procurements, is the member of staff competent in the process to ensure that all legislation is met and that best value is achieved?
- Time frame of delivery.
- Availability of contractors and willingness to provide quotations is increasingly a challenge. Where this is an issue there must be a clear rationale for the decision around the procurement process that must be reported to head teacher and trustees at the earliest opportunity.

3/ Following the process to ensure that legislation is complied with and best value is attained.
(NB the threshold values stated below are doubled for building or civil engineering contracts)

The majority of purchases within the school are legally defined as of “low value” ie below £20,000 for building or civil engineering works)

LOW VALUE CONTRACTS

Below £2,000 (or in the case of oil orders, £6,000):

- At least two verbal quotes are required (in writing is preferable but not mandatory).
- Annotate the school internal order form/manual order form with the quoted information for each supplier/contractor and give an appropriate reason for the preferred choice.
- Complete the internal order form and pass to the Finance Office for processing, either as an order or an on-line purchase.
- Check delivery of service or goods against the requirements of the order.
- The Finance Team will retain all detailed paperwork with the invoice for audit purposes.
- In the case of service contracts, the ‘review’ and ‘expiry’ dates will be the responsibility of the relevant budget holder.

£2,000 to £9,999 (ie below £10,000)

At least three written quotes are required, then follow the process under (b) to (f) above.

INTERMEDIATE/MEDIUM VALUE CONTRACTS

£10,000 to £49,999 (ie below £50,000)

- Check that proposed contract is identified in School Development Plan and/or approved by Trustees.
- Do external funding opportunities exist, if so investigate?
- Care – use financially stable suppliers/contractors, ie assess risk.
- Is there an opportunity to collaborate/combine with other Academies/schools?
- Is there a business case for this level of expenditure?
- Consider use of a procurement framework if this would give best value when compared to individual quotes.
- Decide on the appropriate tendering process to be used. **Important, please see detailed tendering processes below:******

- Accept tenders from at least three different suppliers/contractors as per detailed tendering procedures below (subject to availability).
- Using an evaluation form with appropriate criteria, evaluate tenders as per the detailed tendering procedures below, taking into account on-going commitments such as maintenance and consumables.
- h) Identify the quote offering the best value and state the reason for awarding the contract on the tendering evaluation form.
- i) Check delivery of service or goods against the requirements of the order.
- j) The Business Manager and the Finance Team will retain all detailed paperwork for audit purposes.
- k) In the case of service contracts, the 'review' and 'expiry' dates will be the responsibility of the Business Manager.

HIGH VALUE CONTRACTS

£50,000 to UK Threshold for Public Sector Tenders (this should always be checked to current threshold information before proceeding)

- a) Does the contract exceed the current Public Sector Tender Threshold, if so the tender is subject to EU rules and professional advice must be sought before proceeding.
- b) NB, if collaborating with other schools the combined contract price may exceed the Public Sector Tender Threshold and may be subject to EU regulations.
- c) Check that proposed procurement is identified in School Development Plan and/or approved by Trustees.
- d) Do external funding opportunities exist, if so investigate.
- e) Is there a business case for this level of expenditure on the project/purchase?
- f) Seek professional advice to ensure that correct processes are followed.
- g) Produce an advertisement for the domestic market (taking advice from professionals)
- l) Decide on the appropriate tendering process to be used. **Important, please see detailed tendering processes below:******
 - Accept tenders from at least three different suppliers/contractors as per detailed tendering procedures below
 - Using an evaluation form with appropriate criteria, evaluate tenders as per the detailed tendering procedures below, taking into account ongoing commitments such as maintenance and consumables
- h) Evaluate tenders, taking into account ongoing costs such as maintenance.
- i) Identify tender offering best value and state reason for awarding contract on bid.
- j) Check delivery of service or goods against the requirements of the order.
- k) The School Business Manager and the Finance Team will retain all detailed paperwork with the invoice for audit purposes.
- l) In the case of service contracts, the 'review' and 'expiry' dates will be the responsibility of the relevant budget holder

TENDERING PROCESS***

- a. **Open Tender:** This is where all potential suppliers are invited to tender. The budget holder must discuss and agree with the Business Manager how best to advertise for suppliers/contractors; eg general press, trade journals or to identify all potential suppliers and contact directly if practical. This method of tendering is most conducive to competition and the propriety of public funds but may not always be practical.

Tendering under this procedure is not only “open” to the extent that the work must be advertised but also to the extent that any supplier/contractor expressing an interest is automatically entitled to tender, this may impact on management and administrative time.

- b. **Restricted Tender:** This is where suppliers are specifically invited to tender. Restricted tenders are appropriate where:
- there is a need to maintain a balance between the contract value and administrative costs.
 - a large number of suppliers/contractors would come forward or because the nature of the goods.
 - the contract is such that only specific suppliers can be expected to supply the schools requirements.
 - the costs of publicity and advertising are likely to outweigh the potential benefits of open tendering.
- c. **Negotiated Tender:** The terms of the contract may be negotiated with one or more chosen suppliers. This is appropriate in specific circumstances:
- the above methods have resulted in either no or unacceptable tenders,
 - only one or very few suppliers are available,
 - extreme urgency exists,
 - additional deliveries by the existing supplier are justified.
- d. **Preparation for Tender**
Full consideration should be given to:
- objective of project
 - overall requirements
 - technical skills required
 - after sales service requirements
 - form of contract

It may be useful after all requirements have been established, to rank them (e.g. mandatory, desirable and additional) and award marks to suppliers/contractors on fulfilment of these requirements to help reach an overall decision

e. **Invitation to Tender**

If a restricted tender is to be used then an invitation to tender must be issued. If an open tender is used, an invitation to tender may be issued in response to an initial enquiry.

An invitation to tender should include the following and must be sufficient to guard the school against ‘additional costs’ and/or ‘variation orders’.

- introduction/background to the project;
- scope and objectives of the project;
- technical requirements and detailed specifications;
- implementation of the project;
- terms and conditions of tender and form of response.

f. **Aspects to Consider**

1. Financial

- Like should be compared with like and if a lower price means a reduced service or lower quality this must be borne in mind when reaching a decision.
- Care should be taken to ensure that the tender price is the total price and that there are no hidden or extra costs.
- Is there scope for negotiation?

2. Technical/Suitability

- Qualifications of the contractor
- Relevant experience of the contractor
- Descriptions of technical and service facilities
- Certificates of quality/conformity with standards
- Quality control procedures
- Details of previous sales and references from past customers.

3. Other Considerations

- Pre sales demonstrations
- After sales service
- Financial status of supplier. Suppliers in financial difficulty may have problems completing contracts and in the provision of after sales service. It may be appropriate for the Business Manager to examine audited accounts etc.
- All contractors/suppliers tendering must be treated fairly and equitably.

g. Tender Acceptance Procedures

The invitation to tender should state the date and time by which the completed tender document should be received by the school. Tenders should be submitted in plain envelopes clearly marked to indicate they contain tender documents. The envelopes should be time and date stamped on receipt and stored in a secure place prior to tender opening. Tenders received after the submission deadline should not normally be accepted.

h. Tender Opening Procedures

All tenders submitted should be opened at the same time and the tender details should be recorded.

At least two persons should be present for the opening of tenders as follows:

- For contracts up to £25,000 - two of the budget holder, the Business Manager or the Headteacher.
- For contracts over £25,000 - the Business Manager and the Headteacher A separate record should be established to record the names of the firms submitting tenders and the amount tendered. This record must be signed by people present at the tender opening. For all tender opening a Trustee should be invited to attend.

i. Tendering Evaluation and Decision

1. The evaluation process should involve at least two people. Those involved should disclose all interests, business and otherwise, that might impact upon their objectivity. If there is a potential conflict of interest then that person must withdraw from the tendering process.
2. Those involved in making a decision must take care not to accept gifts or hospitality from potential suppliers that could compromise or be seen to compromise their independence. If

such gifts or hospitality are offered they must be declared and recorded on the register of gifts and hospitality.

3. Full records should be kept of all criteria used for evaluation and for contracts over £25,000 a report should be prepared for Trustees highlighting the relevant issues and recommending a decision. For contracts under £25,000 the decision and criteria should be reported to Trustees.
4. Where required, by the conditions attached to a specific grant from the DfE, the department's approval must be obtained before the acceptance of a tender.
5. The accepted tender should be the one that indicates best value and is economically most advantageous to the academy. All parties should then be informed of the decision.
6. Minutes should be kept of all relevant meetings.