



**Medway Anglican Schools Trust  
Procurement and Tendering Policy  
March 2019**

Version and Date		Action/Notes
1.0	Dec 2015	Draft for Board Approval
2.0	March 2016	Approved by Board
	March 2019	Reviewed and approved by Board
	March 2022	Reviewed by Board

## 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 £2,500 two oral quotations:
- Above £2,500 (£5,000 for works) and up to £10,000, three written quotations;
- Above £10,000 and up to £50,000, three formal quotations to be submitted in writing by a specified date and time and based on a written specification and evaluation criteria;
- Above £50,000 and up to public procurement thresholds (see below), four tenders;

Over public procurement thresholds, five tenders.

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

The public procurement thresholds (net of VAT) are £189,330 from 1/1/20 for supplies and Part A services and £4,733,252 from 1/1/20 for works. The thresholds are changed on 1 January of each even-dated year.

For tenders expected to exceed public procurement thresholds, new UK public procurement opportunities will need to be published on the UK e-notification service called Find a Tender service (FTS)

## PROCEDURES

All purchases with a value greater than £50,000 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 £5,000 the services of an architect 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 Business/Finance Manager 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 Business/Finance Manager 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 £5,000, provided the expenditure is included in the budget, the decision as to which tender to accept will be taken by the Local Governing Body, in consultation with the Business/Finance Manager and the chair of Finance Committee. The decision of the local governing body will be sent to the Directors' Board for approval if it exceeds the values specified in the scheme of delegation. For purchases between £5,001 and £15,000 the decision will be taken by the CEO provided the expenditure is in the budget. For purchases in excess of £15,00 the decision is taken by the Trust Board.
8. For purchases exceeding £50,000, provided the expenditure has been budgeted for, a decision will be recommended by the Local Governing Body. The decision will need to be ratified by the Board of Directors of MAST.
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 local governing body, in line with their terms of reference and the scheme of delegation and then ratified by the Board of Directors of MAST 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 Board of Directors.

## **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/trust 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 academy/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*

March 2022

This Policy will be reviewed by the Board of Directors on a 3-yearly cycle and must be signed by the Chair of Directors, Chair of Governors and Headteacher.

Policy Reviewed:	March 2022
Next Review:	March 2025
Signature of Chair of Directors:	
Signature of Chair of Governors:	Signature of Headteacher: