



COMPETITIVE TENDERING POLICY
Coastal Academies Trust

Signed by: 
Mr R Curtis, Chair of Governors

Date: February 2019

Signed by: 
Mr P Luxmoore, Executive Headteacher

Date: February 2019

Agreed : February 2019

To be reviewed: February 2021

Competitive Tendering Policy

Procedures

For the purposes of this policy a purchase shall include a long term agreement.

A long-term agreement is an agreement entered into with a wholly independent organisation or contractor for a service or a supply where the payments are made periodically during the term of the agreement.

The value of the agreement shall be calculated as the total sum payable for the term of the agreement.

When the schools purchase large items the following rules apply:

1. For purchases expected to cost **in excess of £10,000 but less than £50,000**, three written quotations are sought and provided the expenditure is included within the budget, the decision as to which quotation to accept will be taken by the Business Manager/Bursar, in consultation with the Executive Headteacher, and the Headteacher.
 - A specification will be prepared by the Business Manager/Bursar and authorised by the Executive Headteacher and/or the Headteacher. This will be sent to at least three suppliers.
 - Where appropriate, the suppliers invited to tender should be drawn from the approved list maintained by the finance offices.
 - In some cases there will only be one appropriate supplier (e.g. Microsoft Office software). In these cases it is pointless seeking competitive tenders.
 - Where appropriate the suppliers will be provided with the following information before quoting:
 - an introduction/background to the project;
 - the scope and objectives of the project;
 - any technical requirements; and
 - implementation details for the project;
 - All quotations should be returned to the school for the attention of the Business Manager/Bursar.
 - The Business Manager/Bursar shall inform the successful and the unsuccessful bidders of the result of the quotation process. The reasons for accepting a particular tender will be recorded by the Business Manager/Bursar especially if it is decided to accept other than the lowest quotation.
2. For purchases expected to cost **in excess of £50,000 but less than £100,000**, three written quotations are sought and provided the expenditure is included within the budget, the decision as to which quotation to accept will be taken by the Finance Committee. In the case of building works this may include the necessity to employ the services of an architect and/or quantity surveyor.
 - A specification will be prepared by the Business Manager/Bursar or, in the case of building works as necessary, an architect and/or quantity surveyor.

- This specification will be approved by the Finance Committee and sent to at least three suppliers.
 - Suppliers will be provided with the following information before quoting:
 - an introduction/background to the project;
 - the scope and objectives of the project;
 - any technical requirements; and
 - implementation details for the project.
 - All quotations should be returned to the school for the attention of the Business Manager/Bursar and shall be submitted to the Finance Committee for their consideration.
 - Following the Finance Committee deliberations the Business Manager/Bursar shall inform the successful and unsuccessful bidders in writing. The reasons for accepting a particular quotation shall be recorded by the Business Manager/Bursar when the lowest quotation is not accepted.
 - The decision will be ratified by the full governing body.
3. All purchases with a value **greater than £100,000** must be put out to formal tender. Such tenders are likely to be subject to European Union procurement regulations. Quotations shall be considered by the full governing body.
- A specification will be prepared by the Business Manager/Bursar and authorised by the full governing body. If the proposed works are building works then it is anticipated that the schools will need to employ the services of an architect and/or a Quantity Surveyor.
 - Where appropriate, the suppliers invited to tender should be drawn from the approved list maintained by the finance offices, or in the case of large building works, from those agreed with the architect/quantity surveyor. Otherwise, invitations to tender 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) the implementation details for the project;
 - (e) the terms and conditions of the tender; and
 - (f) the form and date of response to the school, or in the case of building works, to the architect or quantity surveyor.
 - All replies, if to the school, should be addressed to the Business Manager/Bursar 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 governing body
 - 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.
 - No contractor will be allowed to amend the tender after the time fixed for receipt.
 - The Business Manager/Bursar will open a separate correspondence file for each tender which will contain copies of all correspondence or other relevant information.
 - The reasons for accepting a particular tender must be documented, especially if it is decided to accept other than the lowest tender.
 - The following points will be considered when deciding which tender to accept:
 - a. The overall price and the individual items or services which make up that price.
 - b. Whether there are any 'hidden' costs; that is additional costs which the school will have to incur to obtain a satisfactory product.
 - c. Whether there is scope for negotiation, while being fair to all tenders.

- d. The qualifications and experience of the supplier, including membership of professional associations.
 - e. Compliance with the technical requirements laid down by the school.
 - f. Whether it is possible to obtain certificates of quantity.
 - g. The supplier's own quality control procedure; pre-sales demonstrations, after sales service and, for building works, at least a six month defects period and insurance guarantees.
 - h. The financial status of the supplier.
 - i. References from other schools.
 - j. Understanding and compliance with Health and 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 an architect or quantity surveyor, they will be responsible for checking the documents before making a recommendation to the school.

Once a tender is accepted an order should be issued immediately to the supplier in the normal way. On completion of the works or delivery of the product the cost price of the asset (if applicable) will be recorded in the asset register.

- 4. The approval of this policy by the Governing Body shall automatically amend the terms of reference of the Finance Committee so as to incorporate these provisions.