



This policy covers all academies/schools within  
Arden Multi-Academy Trust

<b>Name of Policy</b>	<b>Procurement and Competitive Tendering Policy</b>	
<b>Lead</b>	Christine Austin, Finance Director	
<b>Trustee Committee</b>	Business & Personnel Committee	
<b>Policy Status</b>	Draft	July 2019
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<b>Review Frequency</b>	2 years (unless changes to Public Procurement legislation/thresholds or the Academy-Trust Handbook)	
<b>Version No.</b>	2	
<b>Next Review</b>	Autumn Term 2026	
<b>Amendments</b>	9 <sup>th</sup> December 2025 – minor adjustments	



HENLEY-IN-ARDEN  
SCHOOL



## 1. Aims

This policy aims to ensure that:

- Arden Multi-Academy Trust's funds are used only in accordance with the law, its articles of association, its funding agreement and the Academy Trust Handbook.
- The trust's funds are used in a way that commands broad public support.
- Value for money (economy, efficiency and effectiveness) is achieved.
- Conflicts of interest are managed adequately and appropriately
- The trust has open and transparent procurement procedures
- Trustees fulfil their duties and responsibilities as charitable trustees and company directors.

## 2. Legislation and guidance

The Academy Trust Handbook states that academy trusts are required to have a procurement/competitive tendering policy, and ensure that Public procurement thresholds are observed.

This policy is based on the Academy Trust Handbook, the Procurement Act 2023 and [Department for Education \(DfE\) guidance on procurement](#).

This policy also complies with our funding agreement and Articles of Association.

## 3. Roles and responsibilities

### 3.1 Trustees

Trustees will ensure that:

- Spending decisions represent value for money;
- The Trust's funds are used in a way that commands broad public support;
- Relevant professional advice (such as an external auditor) is used, where appropriate;
- Goods or services provided by individuals or organisations connected to the trust are provided at no more than cost as defined in the Academy-Trust handbook;
- Nobody connected to the Trust, directly or indirectly, uses their connection to the Trust for personal gain;
- Where any trustee has a pecuniary interest in a procurement decision, they exclude themselves from the process and records (e.g. meeting minutes) show that they had no influence on the decision.

### 3.2 Business & Personnel Committee

Academy trustees delegate competitive tendering responsibilities to the Business & Personnel Committee.

The committee is responsible for reviewing the trust's tendering processes, and for reporting to trustees on tenders.

### 3.3 Chief Finance Officer

The Chief Finance Officer (CFO) is responsible for:

- Ensuring appropriate financial governance arrangements are in place;
- Preparing and monitoring budgets;
- Providing information to the finance committee and academy trustees, as appropriate;
- Overseeing and supporting competitive tendering.

#### 4. Purchase procurement thresholds

4.1. These are described in detail within the AMAT Financial Scheme of Delegation policy —see Appendix 1 attached.

#### 4.2 Public Procurement Thresholds

If it is estimated that the cost of a contract is near to or above the threshold for public procurement spending, the trust will seek professional advice to ensure it runs a buying process compliant with the Procurement Act 2023. The current threshold for the supply of goods or services for schools is **£214,904 inclusive of VAT**.

A 'light touch contract', with a higher threshold of **£663,540, inclusive of VAT**, applies for some contracts that are specifically for certain social, health, education and other public services provision. We will seek professional advice to determine if any procurement run by the trust qualifies as a light touch contract.

#### 5. Framework agreements

Where possible, we will use a framework agreement to contract suppliers. These are arrangements that a contracting authority, such as a public sector buying organisation, makes with suppliers. The benefits of frameworks are that they have already been through a competitive tender process and they have favourable terms and conditions. In addition, the framework provider may offer advice and support.

Depending on the framework we choose, we will either pick the best value supplier from a list or run a mini-competition between listed suppliers. In either case, we will follow the DfE guidance on procurement (see section 2 of this policy) to ensure good practice. The reasons for the choice of framework, and for the choice of supplier, will be clearly recorded.

The CEO has been delegated the authority to choose whether to use a framework agreement and which framework to use.

#### 6. Low value purchases

When making low value purchases (under £50k) the Trust will use the most appropriate means of obtaining value for money using one of the following:

- i. Framework agreements – these can be used for contracts of any value
- ii. Catalogues eg/ ESPO or YPO – used for very low value purchases
- iii. Quotes – obtain quotes from at least 3 suppliers
- iv. Run a buying process – to be used for higher value purchases

Whichever method is followed the procedure must adhere to the Trust Financial Scheme of Delegation

#### 7. Tendering procedure: medium-value purchases

When making medium-value purchases (over £50k and under £100K) without a framework agreement, the Trust will use the process outlined below.

- a. **Create a specification** – a specification document will set out what suppliers need to understand what we are looking to buy, including the quality, quantity and delivery date
- b. **Compare suppliers** – a comparison of different suppliers, including their reputation, will help the Trust develop a shortlist of at least 3 suppliers we want to approach for a written quote
- c. **Assess quotes** – an award criteria will be developed to assess suppliers' quotes.

Criteria may include:

- How well the supplier meets our specification
- The whole-life cost of the contract, which may include:
  - The sale price of the goods, works or services
  - VAT
  - Delivery charges
  - Maintenance costs

- Running costs
- The cost of removing and disposing of an item or service once we no longer need it
- Whether there will be price increases or decreases over the life of the contract
- Value for money

Each aspect of the criteria will be evaluated. A record of how the quotes are evaluated will be kept.

The Budget Holder or their Manager will evaluate quotes with support from the CFO.

When we contact suppliers, we will send them:

- The specification
- Deadlines for quotes and when decisions will be made
- Instructions for how to ask clarification questions about the specification

**d. Decide the winning quote**

- Assess the quotes using the award criteria
- A minimum of two people should assess the quotes
- To avoid legal challenges all quotes should be treated fairly and equally, opened in accordance with the specification and kept confidential, secure and auditable

**e. Place an order** – when the best value quote is identified, we will send the supplier a purchase order, which includes details of the:

- Goods, works or services we are purchasing
- Price
- Delivery address
- Delivery deadline and any other important dates
- Payment schedule

**8. Tendering procedure: high-value purchases**

The Trust will make high-value purchases (over £100k under Public Procurement limits) without a framework only in rare circumstances, it must be considered whether professional support is required. When this does happen, we will use the process below.

- a. **Create a specification** (see section 6)
- b. **Assess the market** – we will prepare for the tendering process by developing our knowledge of the market. We will find out how many suppliers are available and the best way to advertise our contract to a range of suppliers
- c. **Check the school's position in relation to Public procurement thresholds** (see section 4)
- d. **Develop a service level agreement (SLA)** – an SLA sets out the standards of service expected from a supplier. Some suppliers may have their own SLAs, which the trust will consider using on a case-by-case basis
- e. **Develop a contract** – a contract will include terms and conditions, a contract management plan and an exit strategy. Some suppliers may have their own contract, which the trust will consider using on a case-by-case basis
- f. **Reduce the number of bids** – to reduce the number of bids the Trust needs to evaluate, we will either use an expression of interest process to gauge interest in the contract or a pre-qualification questionnaire
- g. **Establish how we will assess quotes** – we will set out criteria that will allow us to evaluate which of the suppliers' bids best meets the requirements in our specification, and is the most economically advantageous tender that best combines cost and quality
- h. **Create a timeline for the tender process** – this will include the dates of the clarification period, the deadline for submitting tenders and the date we expect to award the contract
- i. **Prepare an invitation to tender** – this will include:
  - A covering letter with a timeline for the process
  - Instructions on how suppliers can ask clarification questions and submit their tender
  - The specification

- A pricing schedule
  - Any SLA requirements
  - The contract's terms and conditions
  - Contract management requirements (see 'develop a contract' above)
  - Award criteria, including the scoring system and any weightings
  - If appropriate, an invitation for suppliers to give a practical demonstration of their goods, works or services
- j. Advertise the contract** – the contract will be advertised where suppliers are likely to look, such as:
- The Gov.uk "Find a Tender" – this is a requirement if the contract is over the Public procurement threshold
  - The government's Contracts Finder service
  - Local or national newspapers
  - Education publications or websites
  - Trade magazines
- k. Run the tender process and provide clarifications**
- l. Tender responses** – tender responses must be opened by 2 people as specified in the Financial Scheme of Delegation. Tender responses must be submitted by the deadline and late responses will not be considered. The following processes will be followed:
- No tender responses to be opened before the deadline
  - All tender responses to be treated fairly and equally
  - A record kept of all decisions made
  - All information to be kept confidential, secure and auditable
  - The contract to be awarded to the highest scoring bidder
- m. Evaluate tender responses** – at least 2 people will independently score and evaluate each bid, and then compare notes after completing their evaluations; records of decision making and moderation decisions will be kept
- n. Run financial checks on preferred supplier**, to include credit reference agency checks and Companies House checks, take up references if required
- o. Notify suppliers and award the contract**
- p. Finalise the contract** (and advertise the award, if the contract was advertised in Contracts Finder or "Find a Tender")
- q. Abandoning the tender process** – on very rare occasions we may need to halt the tender process. Should this occur, we will notify suppliers who are preparing their bids as soon as possible

## 9. Tendering procedure: high-value purchases over Public Procurement limits

The Trust will make purchases over Public Procurement limits) without a framework only in rare circumstances and only with professional support. When this does happen, we will follow the same process as Section 8 "Tendering procedure: high-value purchases".

## 10. Procedure in the event of a bespoke/sole supplier

In the event that there are is only one supplier that can supply a specific service required by the Trust the following process will apply:

- a. **Assess the market** for suppliers providing a similar service or product
- b. **Obtain quotes from similar suppliers** as a benchmark for the costs of the of the sole supplier
- c. **Produce a justification** to explain why this particular supplier is required
- d. **Obtain approval** in line with the Financial Scheme of Delegation.

## 11. Conflicts of Interest

The staff responsible for the procurement of goods or services will review the register of interests (available from the Governance Professional) to identify any potential conflicts of interest before starting the procurement process. A conflict of interest arises in a procurement context where there is a conflict between the interests of the person acting in relation to the procurement process and those bidding in relation to the procurement. It is where someone involved has a personal or professional interest that could influence, or be seen to influence, their decisions.

Any potential conflicts of interest in a procurement, arising from a direct or family connection, must be declared to the CFO and kept under review.

If anyone believes that a conflict of interest has not been declared must report this to the CEO or (if it is the CEO to the Chair of Trustees).

All conflicts of interest – both actual and perceived – will be managed as follows:

- Bids will always be assessed by staff without a conflict of interest
- Where necessary to avoid any appearance of actual or potential bias, bids will be anonymised prior to being assessed
- Any Trustee or member of staff with a conflict of interest must not be involved in any part of the procurement process
- Trustees will withdraw from discussions and will not vote on any procurement decision where they have a conflict of interest
- All reasonable steps will be taken to ensure that a conflict of interest does not put any supplier at an unfair advantage or disadvantage.

## 12. Monitoring arrangements

The CFO and Business & Personnel Committee are responsible for the implementation of this policy.

This policy will be reviewed and approved by the board of trustees every two years and when Public procurement thresholds change.

## 13. Links with other policies

This Competitive Tendering Policy is linked to the following policy:

- Financial Scheme of Delegation