

Viking Academy Trust



The VIKING ACADEMY TRUST Procurement and Tendering Policy has been written following guidance from The Academies Trust Handbook 2021 and Government advice on buying for schools.

Procurement and Tendering Policy

Approved by the Trust: Term 1 2019

Reviewed every two years: Term 1

Last review date: Term 1 2021

Signed:

A handwritten signature in black ink, appearing to read 'Rob', is written over a faint rectangular stamp.

Chair of Trustees

Procurement and Tendering Policy

The Viking Academy Trust

Schools in the Viking Academy Trust (VAT)

Chilton Primary School
Ramsgate Arts Primary School
Upton Junior School

QUOTATION AND TENDERING

The minimum required numbers of tenders or quotations from appropriate contractors for a given estimated value of contract are:

- Above £8,000 and up to £10,000, at the discretion of the Executive Headteacher and / or the Chief Financial Officer (CFO);
- Above £10,000 and up to £40,000, three formal quotations to be submitted in writing by a specified date and time and based on a written specification and evaluation criteria; authorisation by the FAR committee;
- Above £40,000 and up to EU thresholds (currently £189,330), four tenders;

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

- Over EU thresholds, five tenders. Current Thresholds can be found here [Procurement Law for Schools](#)

For tenders expected to exceed EU thresholds, advertisements must also be placed on Find a tender (FTS) and must follow EU procurement requirements with particular regard to be given to the timescale for such tenders.

PROCEDURES

All purchases with a value greater than £40,000 must be put out to formal tender. The following procedures must be followed in such circumstances:

1. A specification will be prepared by the CLO under the direction of the CFO and authorised by the Executive Headteacher. This will be sent to at least three suppliers. It is anticipated that for any major building works of a value greater than £10,000 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 CLO 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 CFO.
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 CLO 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 £40,000, provided the expenditure is included in the budget, the decision as to which tender to accept will be taken by the (CEO) Executive Headteacher, in consultation with the CFO and the FAR Committee.

8. For purchases exceeding £40,000, provided the expenditure has been budgeted for, a decision will be recommended by the FAR committee. The decision will need to be ratified by the Trust Board.
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 Trust Board, who has delegated responsibility to the FAR committee, in line with their terms of reference. The decision will then be ratified by the Trust Board.
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 FAR Committee and Trust Board.

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 and compliance with, Health and Safety, CDM regulations and Safeguarding 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 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 Viking schools are NON SMOKING sites.

The Trust's Funding Agreement should be considered when applying this policy