





PolyMAT

Procurement and Tendering Policy

Reviewed: August 2021 Approved: December 2021 Revision Due: December 2022

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 £2,000 two oral quotations:
- Above £2,000 (£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 £100,000 and up to EU thresholds, four tenders;

Over EU thresholds, five tenders as per the latest EU thresholds.

PROCEDURES

All purchases with a value greater than £100,000 must be put out to formal tender. The following procedures must be followed in such circumstances.

A specification should be prepared, authorised by the COO and CEO, 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.

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:

- an introduction/background to the project;
- the scope and objectives of the project;
- any technical requirements;
- implementation details for the project;
- the terms and conditions of the tender; and
- the form and date of response to the academy, or in the case of building works, to the architect or quantity surveyor.

Tender evaluation will initially be undertaken by the appointed team. The evaluation team should have at least 3 members, all of which have a detailed knowledge of the tender specification and the key objectives of the tender. The composition of the evaluation team must be agreed by the COO or CEO.

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 lead member of the evaluation team will open a separate correspondence file for each tender which will contain copies of all correspondence or other relevant information.

For contracts up to £100,000, provided the expenditure is included in the budget, the decision as to which tender to accept will be taken by the CEO based on the recommendations of the evaluation team. The results of the tender will be reported to the next scheduled Finance & Personnel Committee.

For contracts exceeding £100,000, provided the expenditure has been budgeted for, the evaluation team will make recommendations to the Finance & Personnel Committee for their decision.

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 Finance & Personnel Committee, in line with their terms of reference and then ratified by the Board of Trustees.

The evaluation process must be fully documented and the documents retained. Feedback should be provided to unsuccessful tenderers on request.

The following points will be considered when deciding which tender to accept.

- The overall price and the individual items or services which make up that price.
- Whether there are any hidden costs; that is, additional costs which the academy may incur to obtain a satisfactory product.
- Whether there is scope for negotiation, while being fair to all tenderers.
- The qualifications and experience of the supplier, including membership of professional associations.
- Compliance with the technical requirements laid down by the Trust.
- Whether it is possible to obtain certificates of quantity.
- The supplier's own quality control procedure; pre sales demonstrations, after sales service and, for building works, a six month defects period and insurance quarantees.
- The financial status of the supplier.
- References from other establishments.
- Understanding and 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 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 Agreements should be considered when applying this policy