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EQUITY AND **EXCELLENCE** IN **EDUCATION**
AND **ENHANCED WELLBEING** FOR ALL

Purchasing Policy for Schools

Guidelines and Procedures for Effective Procurement

Introduction

This document defines the purchasing policy for [name of school], and sets out clear guidelines and procedures to ensure lawful and transparent procurement practices.

Objectives

The primary objectives of this policy are to:

- Ensure Transparency: Maintain open, legally compliant and fair procurement processes.
- Promote Accountability: Ensure that all purchasing decisions are documented and justified.
- Achieve Value for Money: Procure goods and services that meet quality standards at the best possible price.
- Support Educational Excellence: Ensure that purchases enhance the educational environment and support teaching and learning.

Scope

This policy applies to all purchases made by [name of school], including, but not limited to:

- Textbooks and educational materials
- Classroom supplies
- Office and administrative supplies
- IT equipment and software
- Maintenance and repair services, including school cleaning
- Catering provisions and services
- Transportation
- Professional development and training services

Procurement Procedures

1. Needs Assessment

Prior to initiating any purchase, a needs assessment should be conducted to identify the requirements. This process involves consulting with relevant staff to determine the necessity and specifications of the goods or services.

2. Budget Approval

All purchases must be approved by the Headteacher within the allocated budget. Requests for purchases outside the approved budget must be justified and receive additional approval. The governing body will determine the spend limit of the Headteacher on an annual basis.

3. Procurement and Tendering

The use of Council approved contracts or frameworks should be used by schools whenever possible before undertaking their own procurement.

Schools are subject to the Procurement Act 2023 which regulates how procurement activities are undertaken for all contracts, undertaken by any public body (including schools) with a value above set thresholds. Failure to follow appropriate tendering procedures for these types of contracts could put a school at a legal and financial risk

The tendering procedure adopted will be dependent upon the estimated value of the contract and the nature of the goods, services or works to be delivered.

A school must estimate the maximum value of each contract to determine the most appropriate tendering procedure. If the contract is ongoing then a duration should be clearly defined. The estimated value will be inclusive of VAT and should be determined as the maximum amount the school could expect to pay under the contract including, where applicable, amounts already paid and any extension options.

The value determined by this exercise will confirm whether it will be considered above the financial thresholds and therefore subject to the tendering procedures as listed within the Procurement Act 2023. The Procurement Act Thresholds are provided in the Table below and are always provided inclusive of VAT.

The relevant thresholds are:

Category	Threshold Inclusive VAT*
Supplies and Services	£214,904
Works	£5,372,609
Light Touch Services **	£663,540

**As of 1st January 2024. Please note the Thresholds are updated every 2 years.*

*** Light Touch Services are those services described in The Procurement Act and as set out in [The Procurement Regulations 2024](#). These are generally for certain social, health and education services and are subject to more flexible procurement rules.*

It is strongly advised that Schools take specialist advice from the Councils Corporate Procurement service area before tendering or entering into any type of contract where the estimated contract value exceeds the thresholds.

procurement@rctcbc.gov.uk

Contracts below Procurement Act Threshold

For contracts below the thresholds schools should ensure that their purchasing activities are compliant with local policies and procedures and that value for money is achieved. Value for money doesn't always mean lowest cost but a competitive process between suppliers is the primary method of achieving this. The following table sets out the minimum levels of competition that is recommended to be carried out for below Procurement Act Threshold tenders. Where the competition level is defined as having due regard for ensuring value for money is achieved, schools shall have the ability to determine and demonstrate how this is obtained. This may be by obtaining multiple quotes, desktop evaluations, assessment against published criteria, benchmarking or other relevant methods.

Contract Value	Quotation Competition Level
Supplies and Services	
Purchases below £30,000	Due regard for ensuring value for money is achieved.
Purchases between £30,000 and £75,000	2 suppliers invited (minimum)
Purchases between £75,000 and Procurement Act Threshold	3 suppliers invited (minimum)

Works	
Purchases below £100,000	Due regard for ensuring value for money is achieved.
Purchases between £100,000 and £500,000	2 suppliers invited (minimum)
Purchases between £500,000 and £2,000,000	3 suppliers invited (minimum)
Purchases between £2,000,000 and Procurement Act Threshold	4 suppliers invited (minimum)

When undertaking a quotation process it is important to provide suppliers with the necessary information for them to understand the requirement fully. It is also important to understand what a good proposal looks like and how the school will choose which proposal to accept. Typical criteria would include: reputation and reliability, quality of goods or services, price competitiveness, delivery times, after-sales support and Social Value. Unsuccessful suppliers are entitled to receive feedback on why their proposal wasn't selected, and schools must be able to justify their reasoning via records.

General Procurement

When purchasing 'Service' contracts schools must have regard to The Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE), and if there are potential transfers of school or Council employed staff, approval must be sought from the Director of Human Resources prior to undertaking the quotation process.

When purchasing 'ICT' related systems schools are encouraged to discuss any requirements with the Council's ICT Service to ensure appropriate security arrangements are in place.
cybersecurityteam@rctcbc.gov.uk

If the contract involves the sharing and processing of personal information then appropriate contract provisions should be put in place. The Council's Information Management Service will be able to advise.
information.management@rctcbc.gov.uk

Schools must ensure that there is no conflict of interest with their chosen supplier. If a conflict of interest has been identified, then all necessary steps should be taken to mitigate the conflict. A record shall be kept and signed off by appropriate personnel.

Schools must ensure accurate and appropriate records are kept on the decision to award contracts of significant value. A copy of any agreed terms and conditions must be kept.

4. Purchase Orders

Formal purchase orders should be issued for all transactions. Purchase orders must include detailed descriptions, quantities, prices, and delivery instructions. They must be authorized by the appropriate signatories. For relevant contracts, an appropriate set of terms and conditions should be in place, the Procurement Service can assist with this requirement.

5. Receiving and Inspection

Upon receipt, goods should be inspected to ensure they meet the specified requirements. Any discrepancies or defects must be reported immediately to the supplier for resolution.

6. Payment Processing

Payments should be processed only after goods or services are received and verified. Invoices must be matched with purchase orders and delivery receipts before approval for payment. No advance payments should be made, unless in exceptional circumstances.

7. Record Keeping

Accurate records of all procurement activities must be maintained, including purchase orders, quotes, invoices, delivery receipts, and communications with suppliers. These records should be accessible for audits and reviews.

Ethical Considerations

All procurement activities must adhere to the highest ethical standards. This includes:

- Fair Competition: Ensuring all suppliers have an equal opportunity to compete for business.
- Conflict of Interest: Avoiding situations where personal interests could influence purchasing decisions.
- Confidentiality: Protecting sensitive information related to procurement activities.

Environmental and Social Responsibility

Schools are encouraged to consider the environmental and social impacts of their purchasing decisions. This includes:

- Favouring suppliers that demonstrate sustainable practices
- Choosing products that are environmentally friendly
- Supporting local businesses and fair-trade products

Review and Compliance

This policy should be reviewed annually to ensure it remains relevant and effective. Compliance with the policy will be monitored through regular audits and any non-compliance will be addressed promptly.

Conclusion

The purchasing policy for schools establishes a comprehensive framework for responsible procurement that promotes transparency, accountability, and value for money. By adhering to these guidelines, schools can ensure that individuals responsible for incurring public spend are suitably protected, and that their purchasing activities are appropriate and in accordance with the school's overall objectives.