



Procurement & Tendering

Approved by: Trust Board

Last reviewed: July 2026

Next review due: July 2027

PROCUREMENT & TENDERING

1. Scope

This policy is written and approved at board level, but applies to all employees, trustees and governors of schools, settings, and services, hereafter the 'organisations,' within The Claxton Trust.

It has been created using a model policy created by Herts for Learning and has therefore been produced in consultation with external advisors and the professional associations/trade unions.

2. Quotations/tendering & delegated limits

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

LIMIT (excl. VAT)	QUOTATIONS	DELEGATED AUTHORISATION	
		School	MAT
Up to £5,000	a quote or price must always be obtained before an order is placed	Deputy headteacher/ headteacher	CEO
Above £5,000 and up to £10,000	two written quotations	Deputy headteacher/ headteacher	CEO
Above £10,000 and up to £20,000	three written quotations	Headteacher	CEO
Above £20,000 and up to £50,000	three written quotations	Local governing body	Finance and audit committee
Above £50,000 and up to Public Purchasing Thresholds	Framework or three formal tenders based on a written spec and evaluation	Board	Board
Over Public Purchasing Thresholds	Framework or formal tender following PCR 2015	Board	Board

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

Public Procurement Thresholds (net of VAT) are published by the Government on 1 January of each even-dated year.

On rare occasions it may not be possible to source the required number of comparison quotes, for example if goods or services are extremely specialist in nature. In such circumstances, the school or setting must demonstrate the reasons why it was not possible to source the relevant quotes and the delegated authority must document that they were satisfied that it was impossible to meet the purchasing requirements set out above.

Renewal of annual contracts / services

To enable flexibility and ensure that the organisation does not overburden itself financially, it may be prudent to commit to annual contracts rather than two-, three- or four-year contracts in some instances. To facilitate continuity of service, contracts may be renewed for up to five years from the initial contract date without further quotations being sought, providing they meet the following criteria:

- An annual contract review is undertaken and confirms that there are no concerns with the service received
- The initial procurement process followed the procurement and tendering policy
- There are no material changes to the contract year on year other than those which result in better value
- The supplier provides a full written quotation in advance of the renewal
- Costs do not increase by more than 10% from the previous year

- The total value of the renewed contract does not go over the next threshold
- The appropriate authority approves a new purchase order.

The organisation will normally go through a formal procurement process after the fifth year of any contract regardless of value. However, on rare occasions there may be situations where a change in supplier, service or product will either have a significant impact on security or business continuity and is therefore highly likely to cause significant disruption to the safe and effective running of schools and settings within the Trust, or where the cost of changing systems will significantly outweigh any financial benefits of changing supplier. In such circumstances, the CFO and AO will prepare a business case for the board to review prior to the fifth year of a contract, and the board may agree to extend a contract providing it remains below public purchasing limits and it is prudent to do so. In such circumstances, the board will need to explain how the extension ensures value for money.

Procedures

All purchases with a value greater than £50,000 must be put out to formal tender or purchased via an approved framework.

The following procedures must be followed when tendering:

1. A specification will be prepared, and this must be authorised by a member of the trust board.
2. The specification must be sent to at least three suppliers. Consideration should be given to whether it is appropriate to engage the services of an architect to deal with the handling of specifications and suitability to tender.
3. 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 (where appropriate):
 - (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 evaluation criteria; and
 - (f) the form and date of response to the academy, or in the case of building works, to the architect or quantity surveyor.
4. All replies should be emailed to the CFO by a specified date. They will be kept securely until that date and passed to tender lead.
5. All tenders will be read at the same time by the tender lead and details of the contractor, quotation and any other details recorded.
6. No contractor will be allowed to amend the tender after the time fixed for receipt.
7. The tender lead will open a separate file for each tender which will contain copies of all communication or other relevant information.
8. Decisions about which tenders to accept will be taken in line with the procurement thresholds detailed above.

9. 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 board.

Acceptance of tender

The following points will be considered when applying evaluation criteria:

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 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. 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.
7. The financial status of the supplier.
8. References from other establishments.
9. Understanding & compliance with health & safety, CDM regulations, safeguarding issues related to working on a school site and with the Equalities Act.

In the case of building works, where the architect or quantity surveyor are conducting the tendering process, they will be responsible for checking the documents of the lowest tender before making a recommendation to the academy.

Once a tender is accepted an order should be issued immediately to the supplier in the normal way.

The Master & Supplemental Funding Agreement should be considered when applying this policy.