

Warren Farm Primary School

Tendering Policy

Review Body:	Finance and Trustees Committees
Leadership Group Responsibility:	Business Manager
Type of Policy:	School Policy
Review Period:	Every year
Reviewed:	September 2022
Next Review:	October 2023

Procedures

All purchases with a value greater than £213,477 for goods, £213,477 for most services and £5,336,937 must be put out to formal tender. The following procedures must be followed in such circumstances:

1. A specification will be prepared by the budget holder, authorised by the chair of the relevant committee and Business Manager and 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 the approved list maintained by the finance manager, or in the case of building works, 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 school, 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 Business Manager 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 chair of the relevant committee.
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 Business Manager 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 the limits outlined above, provided the expenditure is included in the budget, the decision as to which tender to accept will be taken by the Business Manager, in consultation with the Headteacher and the Chair of Finance.
8. For purchases exceeding the thresholds, provided the expenditure has been budgeted for, a decision will be recommended by the Finance committee. The decision will need to be ratified by the full governing body.
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 finance committee, in consultation with the relevant committee, and then ratified by the full governing body; and
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 full governing body.

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 school 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 schools.
10. Understanding & 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 school.

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