



Thameside Primary School: Quotations and Tendering Policy

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Contents

1. Introduction	Page 3
2. Public Contracts Regulations 2015	Page 3
3. Frequently asked questions (FAQs) about the new Public Procurement Thresholds for 2022	Page 4
4. Ensuring compliance	Page 4
5. Local Procedures	Page 4
6. Expenditure limits – tendering	Page 5
7. Buying for schools	Page 6
8. Preparation for quotations/tender	Page 6
9. Contract Specification	Page 6
10. Sustainable and Ethical Procurement	Page 7

Policy reviewed by:	Vicki Lucas
Key Changes:	No changes.



1. Introduction

Maintained schools have a duty to make sure they obtain the best value for money from any contracts they enter in to. Whether an existing contract is coming to an end or a new service or good is required, schools need to follow an agreed procurement process.

The over-riding procurement policy requirement is that all public procurement must be based on value for money, defined as “the best mix of quality and effectiveness for the least outlay over the period of use of the goods or services bought”. This should be achieved through competition unless there are compelling reasons to the contrary.

Public sector procurement is subject to a legal framework which encourages free and open competition and value for money but whilst maintained schools are exempt from following the Public Contracts Regulations 2015, it is expected that they will still procure contracts compliant with EU Treaty principles which include:

- Non-discrimination and equal treatment – suppliers, standards, products;
- Transparency – open and transparent procurement processes;
- Proportionality – procurement processes appropriate to the type of contract.

2. Public Contracts Regulations 2015

Procurements above certain levels (referred to as “OJEU thresholds” noted below) should still comply with the Public Contracts Regulations. The thresholds depend on the type of contract and are based on the lifetime value of the contract, including any extension or renewal options.

New public sector procurement thresholds will come into force on 1st January 2022.

The revised financial thresholds will apply to all public procurements by schools, academies, multi-academy trusts, colleges and universities under the Public Contracts Regulations 2015 (PCR 2015).

Please note that from 2022 there is a change in the way that contract values under the above regulations are calculated.

Prior to January 22, the estimated value of the contract is calculated over the whole lifetime of the contract net of VAT. From 1st January 2022 contract values should be calculated inclusive of VAT which will need to be taken into account when calculating the value of procurement exercises. In effect these changes have reduced the thresholds, capturing more contracts under the regime.

The financial threshold changes are summarised below. Schools, academies, multi-academy trusts, colleges, universities are classified as ‘sub central contracting authorities’ in respect of the threshold for Public Supply and Services (as highlighted in the grid).

PUBLIC CONTRACTS REGULATIONS 2015

Contract Type	Current Threshold	From 1 January 2022
Public Works Contract	£4,733,252	£5,336,937
Supplies and Services (Central Government)	£122,976	£138,760
Supplies and Services (Sub-Central Contracting Authorities)	£189,330.00	£213,477
'Light Touch Regime' Services	£663,540	£663,540

Last reviewed Jan 2024



3. Frequently asked questions (FAQs) about the new Public Procurement Thresholds for 2022

What about procurements before 1st January 2022?

The threshold change only applies to new procurement processes started on or after 1st January 2022. For existing contracts, or procurements currently at the tender stage, the previous thresholds apply.

How do you calculate the total contract value?

To calculate the total contract value for the purpose of establishing whether The Regulations apply, always be sure to factor in the full duration of the contract (not the annual value), any optional extensions and the cost of any ancillary services, maintenance, equipment or spare parts that may increase total whole-life cost.

What if your contract exceeds the new thresholds?

You must advertise the opportunity on the Find a Tender Service and on Contracts Finder, following the procedural rules set down in The Public Contracts Regulations 2015 (The Regulations), before you can award the contract.

Do I need to complete a full tender process for every procurement over the new thresholds?

Using a framework agreement can remove the need to complete your own lengthy tender process whilst increasing efficiency and reducing risk.

4. Ensuring compliance

For procurements that fall under these rules, there are usually 2 options:

1. **Use an approved framework agreement** – the School's Buying Hub <https://www.gov.uk/guidance/buying-for-schools> can provide help and information on a wide-range of frameworks agreements. These will have already followed an OJEU tender process, which schools then access via direct award (usually by appointing a pre-approved supplier), or a mini-competition process (by inviting all pre-approved suppliers to bid).
2. **Run a Tender process:** A formal and legal set of rules apply to OJEU tenders, outlined by the Public Contracts Regulations, including advertisement and other specific timelines and processes. Amendments to the Regulations in relation to the withdrawal of the UK from the EU came into force on 1st January 2021. This means that, whilst the framework and principles underlying the public procurement regime (the procurement procedures, financial thresholds, etc.) will not substantially change, contracting authorities will be required to publish public procurement notices for new procurements to the new UK e-notification service, Find a Tender (FTS): <https://www.find-tender.service.gov.uk>

5. Local Procedures

The school will follow Buying Guide for Schools – [Right way to buy](#)

Thameside Primary School governing body agrees that all purchases under the value of £20,000 may be delegated to the authority of the Head Teacher. Purchases over this value must be subject to governing body approval. Where possible frameworks will be exhausted first before seeking quotations and running a

Last reviewed Jan 2024



tendering process. Where any contract is required above £20,000 specification and details of suppliers will be submitted to the governing body for approval. In the case of emergencies the approval of the Chair of Governors must be sought.

Where a quotation other than the lowest is accepted, the reasons for this decision will be reported to the governing body and included in the minutes of the relevant meeting.

6. Expenditure limits – tendering

Thameside Primary School policy on tendering is as stated within the Council's Scheme of Financing for Schools Section 2.17) on tendering procedures and includes:

- Advertisement of tenders
- Compliance with Procurement Contracts Regulations
- The procedures for the submission, receipt, opening and recording of tenders
- The circumstances when financial or technical evaluation is necessary
- Acceptance of tenders
- The form of contract documentation
- Cancellation clauses in cases involving corruption or bribery

Low Value Procurement

For low value procurement below £10,000, competitive quotations/tenders are not required, although the purchase order must specify the services, supplies or works to be provided and set out the price and terms of payments.

Intermediate (Medium) Value Procurement

For intermediate value procurement (£10,000-£50,000) at least 3 written quotations or tenders must be invited before a formal purchase order is issued specifying the supplies, services or works to be provided. Emailed quotations are acceptable for these purposes. For procurements over £20,000, the contract opportunity shall be advertised in the South East Business Portal or equivalent as directed by the LA accessible here <https://sebp.due-north.com/>

This portal is used to bring buyers and suppliers together electronically making it easier to communicate business opportunities for the benefit of our local economies.

The Local Authorities listed use the South East Business Portal to advertise forthcoming contract opportunities and as a register of awarded contracts.

High Value Procurement requiring advice from RBC

The following shall be regarded as High Value Procurement:

- Procurements valued between £50,000 and above
- Where the risk in a specific procurement is perceived to be high
- Any procurement of any value that may involve a transfer of staff

In this case, one of four contract award procedures must be used ie. open, restricted, negotiated or competitive dialogue. In all instance of high value procurement, advice must be taken from the LA.

Last reviewed Jan 2024



Purchases above £213,477

Specific Public Procurement rules apply to this value of purchase and the school will contact the LA for advice.

7. Buying for Schools

Maintained schools continue to be exempt from these procedures but shall follow the principles as set out in the Buying in Schools guidance published by the government <https://www.gov.uk/guidance/buying-for-schools> updated 24th January 2022.

Comparison of goods/services against the DfE Frameworks (recommended national deals)

The school shall undertake relevant research prior to purchasing and renewing existing goods or services to ensure value for money. The DfE **buying for schools guidance** is designed to help prepare schools before buying to help get the best deal and save money.

<https://www.gov.uk/guidance/buying-procedures-and-procurement-law-for-schools/before-you-start>

The Schools Commercial Team (SCT) within DfE maintains a range of frameworks for goods and services. These frameworks are assessed for compliance with procurement regulations, ease of use, suitability and value for money. This service is for school buying professionals.

<https://www.gov.uk/guidance/find-a-dfe-approved-framework-for-your-school>

It will help you to:

- find ways to buy goods or services, recommended by the Department for Education (DfE)
- get value for money
- comply with buying procedures and procurement law (OJEU)

8. Preparation for quotations/tender

Clarity is essential to avoid misunderstanding. Initial specifications need to be drawn up as precisely as possible and schools need to ensure that all suppliers' bids are based on exactly the same specifications.

<https://www.gov.uk/guidance/buying-procedures-and-procurement-law-for-schools/writing-a-specification>

9. Contract specification

A tightly drawn up contract specification is the best way for Thameside Primary School to ensure that it receives the service it was expecting. It is the basis on which Thameside Primary School can seek redress for service quality or quantity if it falls below the level specified and therefore provides a framework against which the success of the contract can be measured.

A contract specification should contain the following elements:

- Contract duration
- Definitions
- Contract objectives

Last reviewed Jan 2024



- Services to be provided
- Service quantity
- Service quality standards (could include customer satisfaction surveys, number of user complaints, inspection checks)
- Contract value and payment arrangements
- Information and monitoring requirements
- Procedure for dealing with disputes
- Review and evaluation requirements

10. Sustainable and Ethical Procurement

The school should take the time to understand the fundamentals of ethical behaviour when selecting and managing suppliers as well being aware our own personal responsibilities and demonstrate integrity at all times. This covers issues including human rights, employment rights, environmental management, and bribery and corruption.

The school will consider the impact of **environmental**, economic and social factors along with price and quality when procuring and purchasing goods and services.

When it is deemed appropriate, the school will seek assurances from suppliers that they are compliant with ethical and environmental practices including treatment and protection of workers and environmental practices such as disposal of any equipment or rubbish from the school property.

V Lucas, SBM Jan 2024