



**SUTTON COLDFIELD GRAMMAR SCHOOL FOR
GIRLS**

PROCUREMENT AND TENDERING POLICY

**Date: November 2025
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Statement of intent

Sutton Coldfield Grammar School for Girls aims to achieve value for money on all its tendering and procurement activities. With that in mind, this policy has been created to establish procedures to ensure all members of staff involved in tendering and procurement are aware of the standards that they are expected to follow.

Preferred suppliers with whom the school has had previous positive interactions will be used wherever possible. During tendering and procurement processes, the following five key objectives will always be kept in mind:

- **Achieving value for money** – including the cost of goods and services, the quality of goods and services, and administrative costs;
- **Ensuring fairness** – ensuring that all parties are treated in a fair and equitable manner;
- **Establishing accountability** – taking responsibility for expenditure and the conduct of staff; and
- **Allowing probity** – ensuring there is no private gain from the academy's financial affairs.
- **Mitigating risk** – Ensuring that the risks to the school are assessed as part of the evaluation process.

1. Legal framework

This policy has due regard to legislation and national guidance, including but not limited to the following:

- DFE (2025) Academy Trust Handbook;
- Procurement Act 2023;
- [Department for Education \(DfE\) guidance on buying procedures and procurement law](#).
- [National Procurement Policy Statement](#)

This policy will be implemented in conjunction with the school's:

- GDPR Policy;
- Finance Policy; and
- Reserves and Investments Policy.

2. Definitions and key terms

Procurement is the process of finding and agreeing to terms, and acquiring goods, services, or works from an external source.

Tendering is the process of choosing the best company to supply goods or carry out a job. This is done by asking several companies to make offers for supplying the goods or completing the work.

Purchase Order (PO) is an official order from the school to a supplier detailing the goods or services required to be supplied.

Value of spend/ contract: The value is defined as the total amount payable over the life of a contract which includes VAT for over the Procurement Act Threshold. Under the PA threshold spend is net of VAT.

Best Value is based on cost and quality, and relevant benchmarking data will be taken into account wherever appropriate.

Cost: the key factor relevant to "Cost" under this policy is whole life cost, not the lowest purchase price. Whole life cost takes into account the cost over time, including capital, maintenance, management, operating and disposal costs.

Quality: paying more for higher quality may be justified if the whole life cost is better value, for example, taking into account maintenance costs, useful life and residual value, or after evaluation reduces risk to the school.

3. Procurement Limits

Below are the limits that determine certain processes when purchasing goods or services. In most cases a PO will be required. Exceptions to a PO being required are set out below the table.

Value of Spend/Contract	Preferred Process	Sign off
Under £1,000	Best Value	Budget Holder
£1,000 to £12,500	Best Value, preferably three quotes	Finance and Operations Director (FOD)
Over £12,500 to £30,000	Three written quotes	Head Teacher
Over £30,000 to £60,000	Written specification issued and three written quotes	Chair of Finance Committee
£60,000 to £214,904 for Supply, Services and Design Contracts £60,000 to £5,372,609 for Works Contracts	Formal Tender Process	Finance Committee
£214,904 and over to Supply, Services and Design Contracts £5,372,609 and over for Works Contracts Procurement Policy Note 11/23 – New Thresholds (HTML) - GOV.UK (www.gov.uk)	Formal Tender with specialist support or Framework agreement as laid out in section 5	Full Governing Board

For orders of £12.5k and over it is advised that a written specification is supplied.

A PO is required for any purchase over £100 unless the purchase items are stated below:

- Rent or Business Rates
- Credit card transactions
- Work and services executed under a contract
- Supply/Agency staff
- Ongoing yearly subscriptions
- Approved via Governing Committee – e.g. Trips
- Leases
- Utilities

The value of the contract is based on the entire length of the contract.

4. Public Procurement Threshold

If it is estimated that the cost of a contract is near to or above the threshold for public procurement spending, the trust will seek specialist advice to ensure it runs a buying process compliant with the Procurement Act 2023. The current threshold for the supply of goods or services for schools is £214,904 inclusive of VAT and £5,372,609 for works contracts inclusive of VAT.

5. Framework Agreements

In some circumstances we may use a framework agreement to contract suppliers. These are arrangements that a contracting authority, such as a public sector buying organisation, makes with suppliers. The benefits of frameworks are that they have already been through a competitive tender process and they have favourable terms and conditions. In addition, the framework provider may offer advice and support.

Depending on the framework we choose, we will either pick the best value supplier from a list or run a mini-competition between listed suppliers. In either case, we will follow the DfE guidance on procurement (see section 2 of this policy) to ensure good practice. The reasons for the choice of framework, and for the choice of supplier, will be clearly recorded in a procurement waiver.

6. Procurement Waiver

In some cases a procurement waiver may be sought for reasons outlined below with approval granted in line with Section 3:

- Unforeseen emergency requirement;
- The goods or services are only available from one source and there is no possibility of the school's requirements being met in any other way;
- An extension is required to a current contract in order to allow sufficient time to complete a competitive tendering exercise; or compliance with section 72 of 2015 [Public Contract Regulations](#) or Procurement Act 2023
- Where the cost/benefit of running a procurement are greater than the potential gain of the new contract; and
- Buying items through a framework agreement, outlined in Section 4 such as the Government Crown Commercial Services Framework. More on this can be found at: <https://www.gov.uk/guidance/buying-for-schools>

A Procurement Waiver form must be completed – attached in Appendix 1 and stored with the paperwork of the Procurement.

7. Formal Tender

There are many ways of tendering to ensure the School achieves the appropriate outcomes to meet the needs of the requirement and will be dependent on the type of product and service required and if the total value of the contract is above the thresholds set out with in the PA2023

Main types of procurement where the cost of the contract is under the PA2023 threshold are:

Closed Competition: Where the school undertakes a procurement exercise to an invited list of potential suppliers normally between three and five providers

Open Competition: Where the school undertakes a procurement exercise where they advertise the requirements of the school of the and invite suppliers to provide a proposal to the school which is then evaluated based on supplier capability, solution provided, costs of the solutions and other factors identified as important for the best outcome of the school

Types of procurement under the PA2023 process

Open Procedure: The Open Procedure is a one stage procurement where a Tender Notice and associated invitation to tender documents are published, and anyone can submit a tender against the invitation to tender documents. Tenders submitted are then evaluated and the contract is awarded based on the published evaluation methodology.

There are no de-selection stages such as presentation, demos etc. within this procedure. However, bidders can be disqualified if they do not meet the criteria for the condition for participation.

The Open Procedure is most suitable for straight-forward procurements such as Office Stationery.

Flexible Procedure: The Flexible Procedure enables the procurement to be designed around the needs of the requirement in two or more stages. An optimal solution may include several stages where bidders can be assessed against a criterion before being short-listed for the next stage. This may include but is not limited to the inclusion of presentation, demonstration, site visits, etc..

Creating Standard Frameworks: A standard framework is an agreement which can be procured under the Open or Flexible Procedures. The framework itself sets out with sufficient detail, the scope of services, terms and conditions and pricing etc., which future contracts can be secured under. Most frameworks allow you to secure goods, services and works of any value, including above threshold.

This type of framework can run for a maximum of 4 years from the commencement date.

Once suppliers have been awarded a framework agreement, the supplier list is locked for the duration of the framework.

Creating an Open Framework: An open framework is a scheme of successive frameworks awarded on substantially the same terms. The maximum duration of an open frameworks is 8 years, and the framework must be reopened at which point new suppliers can be added.

An open framework must provide for the framework to be re-opened at least once in the first three years of its life and at least every five years thereafter, and to last 8 years in total.

Creating a Dynamics Markets: A dynamic market is a list of suppliers who have met the 'conditions for membership' of the dynamic market and become eligible to participate in future procurements. New suppliers can join the dynamic markets any time subject to them meeting the conditions for membership. A dynamic market can run for up to 8 years from contract award.

8. Register of Interests

The school will document all relevant business and pecuniary interests of members, trustees and senior employees, including:

- Directorships, partnerships and employments with businesses;
- Trusteeships and governorships at other educational institutions and charities; and
- For each interest, the name of the business, the nature of the business, the nature of the interest and the date the interest began.

The register of interests will identify all relevant material interests from close family relationships between the school's members, trustees or local governors. It will also identify relevant material interests arising from close family relationships between those individuals and employees.

The school will consider any other interests appropriate for inclusion on the register of interests.

The board of trustees will keep the register of interests up-to-date for members and trustees.

The school will publish on their website the relevant business and pecuniary interests of members, trustees and the accounting officer.

The publication of interests belonging to any other individuals named on the register is at the discretion of the school.

9. Risk Assessment

As part of any formal tender process, FOD will undertake a review of risks associated with the tender to ensure the risks to the school are considered and appropriately mitigated.

10. Data Protection

Procurers should ensure that suppliers, contractors and providers at a minimum adhere to the equivalent standards in the School's data protection policies.

It is the responsibility of the contract owner to ensure that the appropriate contractual terms are in place, that appropriate due diligence is performed and that the necessary contractual actions are carried out to reduce the risk of regulatory non-compliance.

11. Sustainability

The school considers the principles that are documented National Procurement Policy Statement which helps the school understand and manage risk and opportunities related to environmental, social, and governance. Due consideration to this must be considered when making a purchase of any goods, services or works.

12. Monitoring and review

This policy is reviewed annually by the Finance and Operations Director, Chair of the Operations Committee and the Headteacher, and formally approved by the Operations Committee.

The scheduled review date for this policy is November 2026. **Appendix 1 Procurement Waiver Template**

Sutton Coldfield Grammar School for Girls – Procurement Waiver

Tender

Date:

Rationale:

Value of Contract:

£12,500 to £30,000

£30,001 to £60,000

£60,001 to £214,904 for Services and Design Contracts

£60,001 to £5,372,609 for Works Contracts

Service/Design contracts over £214,904

Works Contracts over £5,372,609

Date of Committee Procurement Route Agreed:

Decision:

Evidence of sign off:

Chair/ Committee

Committee Approval/Evidence

INITIAL EQUALITY IMPACT ASSESSMENT FORM

Name of policy/activity/project:

Tendering and Procurement Policy

Is this a new or an existing policy/activity/project?

Existing policy updated

Scope/timescales for project or activity (including review date):

Approval in November 2025, next in 2026.

Policy/project lead and Author of Equality Impact Assessment:

Finance and Operations Director

Outline of main aims of this activity/policy/project:

To provide guidelines for the procurement and tenders of goods and services.

Who will benefit/be affected by this policy/activity?

Students, staff, Trustees and parents of Sutton Coldfield Grammar School for Girls and also visitors to the Trust.

If an existing policy/activity, do you have any data of use by or impact on different groups which may raise concerns over an equality impact?

No concerns

Does the activity have the potential to impact differently on groups due to a protected characteristic (eg race/ethnicity, gender, transgender, disability, religion & belief, age, sexual orientation, maternity/paternity) for:

No.

(a) Students and members of the community? (eg The Governing Board, students, contractors, visitors, hirers of the premises, agency staff, suppliers etc). Which groups are likely to be affected?

No

(b) Employees?

No

Does this activity make a positive contribution to the Trust's general or specific duties under the Equality Act 2010? If yes, please detail.

Yes – the Policy applies to all equally

Having reviewed the potential impact of the policy/activity listed above, **I believe a full impact assessment is required / NOT required** (delete as applicable with justification below)

Full impact assessment is not required

Justification: The policy is of equal benefit to all students, regardless of gender, race, religion, sexual orientation etc.

Name : Doug Thorp

Date : November 2025