

The Bishop Wheeler Catholic Academy Trust



Policy

Procurement

Published: May 2022

To be reviewed: 2025-26





Our Mission

The school communities of The Bishop Wheeler Catholic Academy Trust will work together in truth and love to provide the best possible opportunities for all our young people and their families.

Our mission is the provision, development and future safeguarding of a World Class Catholic Education where every child, member of staff and family matters

The schools, their governors and the trust directors will work together, based on the principle of subsidiarity, in faithfulness and humility, to provide an education where Christ and His values of respect, service, tolerance, dignity and forgiveness are at the heart of everything we do.

This policy was approved by the Resources Committee on behalf of the Trust Board

Signature:

**Mrs Diane Gaskin
Chair of the Trust Board**

Date: 03/05/22

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BISHOP WHEELER CATHOLIC ACADEMY TRUST PROCUREMENT POLICY

Purpose

The ESFA Academies Financial Handbook states 'The Academy Trust must be able to show that public funds have been used as intended by Parliament'.

ESFA principles are:

- That spending is made for the educational purpose intended and there is probity in the use of public funds
- Evidence is available to ensure value for money is achieved, by the application of agreed procurement procedures, as laid out in this policy
- Internal delegation levels are applied at each individual academy and reviewed annually
- Official OJEU procurement thresholds are observed

The Bishop Wheeler Catholic Academy Trust's procurement principles are established in accordance with the Trust's Funding Agreement, Articles of Association and Scheme of Delegation.

Detailed purchasing guidelines are available in the BWCAT 'Financial Procedures Handbook' that is reviewed annually. Internal delegations for individual academies within the Trust must be reviewed, signed annually and adhered to. Copies are held at the Trust office. Invoices without correct authorisation signatures will not be passed for payment.

QUOTATION AND TENDERING

1. Below £10,000

Use a preferred supplier identified by the Trust

Use a Framework (select supplier from a list OR run a mini-competition)

2. Between £10,000 and £40,000

Get at least 3 written quotes from suppliers (these should be official quotations and not just prices on an email)

Use a Framework (select supplier from a list OR run a mini-competition)

Academy Council approval is required for expenditure by academies.

3. Between £40,000 and £213,477

Advertise a contract and run a buying process (Tender)*

Use a Framework (select supplier from a list OR run a mini-competition)

**Three formal tenders are required. Tenders will be managed with the support of the Central Trust Team. The budget holder and Academy Council must seek approval from the Trust Board for expenditure at this level. EFSA approval may be required.*

1. A specification will be prepared and sent to at least three suppliers. It is anticipated that for any major building works the services of an architect would be engaged to deal with the handling of specifications and suitability to tender.

2. Replies should be addressed to the Trust COO or Head of Estates in a plain sealed envelope marked 'Tender' by a specified date. Replies will be kept sealed until that date.

3. 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.
4. No contractor will be allowed to amend the tender after the time fixed for receipt.
5. 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 Trust Board.

4. Over £213,477

PCR compliant process

Use a Framework (select supplier from a list OR run a mini-competition)

Thresholds:

Goods - £213,477

Works - £5,336,937

Most services - £213,477

Some services for Education are covered by the 'light touch regime' – threshold is £663,540

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 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. 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 establishments.
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 Trust.

TRADING WITH CONNECTED PARTIES

The ESFA state Academy Trusts must be 'even-handed in their relationships with connected parties by ensuring Directors understand and comply with their statutory duties as company Directors (and named 'key management personnel', effective September 2016) to avoid conflicts of interest, not to accept benefits from third parties and to declare interest in proposed transactions or arrangements.'

Connected party transactions are carefully managed and applied across the Trust, through the COO and Head of Finance, to avoid both real and perceived conflicts of interest, promoting integrity and openness in accordance with the seven principles of public life.

Records of connected party transactions are held, and disclosures are made in the annual accounts to evidence that such transactions are conducted in accordance with the highest standards of accountability and transparency.

A register of interests is held, in accordance with the ESFA requirements. Relevant business interests are published on the Trust and individual academy websites. When goods or services are procured from connected parties, it must be evidenced that no more than cost has been paid, with a de-minimus amount of £2,500, cumulatively, in any one financial year.

Appropriate documentation is put in place to evidence an open and fair process when trading with connected parties. Statements of assurance will be sought, to confirm that charges do not exceed the cost of the goods or services, on the basis of an open book agreement requiring the supplier to demonstrate, if requested, that their charges do not exceed the cost of supply.

The 13 schools in our Trust:

St. Mary's Menston, a Catholic Voluntary Academy

St. Joseph's Catholic Primary School Otley, a Voluntary Academy

Ss Peter and Paul Catholic Primary School, a Voluntary Academy

Sacred Heart Catholic Primary School Ilkley, a Voluntary Academy

St Mary's Horsforth Catholic Voluntary Academy

St. Joseph's Catholic Primary School Pudsey, a Voluntary Academy

St Joseph's Catholic Primary School Harrogate, a Voluntary Academy

St Mary's Catholic Primary School Knaresborough, a Voluntary Academy

St. Stephen's Catholic Primary School and Nursery, a Voluntary Academy

Holy Name Catholic Voluntary Academy

St Roberts Catholic Primary School, a Voluntary Academy

St John Fisher Catholic High School Harrogate, a Voluntary Academy

St Joseph's Catholic Primary School Tadcaster, a Voluntary Academy



The Bishop Wheeler Catholic Academy Trust

The Bishop Wheeler Catholic Academy Trust is a charity and a company limited by Guarantee, registered in England and Wales.

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