



Procurement & Tendering Policy 2026-2027

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1. **Scope and Purpose of Policy**

This document sets out the policy of Isle Education Trust regarding the purchasing of goods and services. It will outline the Trust's formal purchasing strategy.

To achieve Value for Money (VFM), the Trust operates a centralised procurement function, ensuring key controls are in place and operating effectively and all appropriate policies and procedures are followed. This centralised function will maximise available economies of scale.

Procurement will be co-ordinated by the Chief Finance & Operations Officer (CFOO) in partnership with the Finance Team, enabling the aggregation of requirements and a reduction in the number of suppliers used across the Trust.

The Trust will comply with the Procurement Act 2023, Procurement Regulations 2024, the Academy Trust Handbook and all other relevant procurement legislation and guidance in force.

2. **General Principles**

Isle Education Trust believes that goods and services should be purchased through fair competition to ensure VFM and overall efficiency. Purchases will follow these principles:

- To promote the delivery of VFM through good procurement practice, utilising the most cost effective and efficient methods of procuring goods and services
- Identify opportunities for collaboration to increase buying power and build relationships
- To develop relationships with other organisations (including Multi Academy Trusts) and suppliers to ensure lasting good service and VFM
- To ensure the Trust's supply chain is sustainable, ethical, socially and environmentally minded. Suppliers providing goods or services to the Trust shall be expected to comply with the provisions of the Modern Slavery Act 2015 and, where applicable, provide evidence of their Modern Slavery Statement and associated due diligence arrangements.
- To ensure all procurement is compliant with legislation, the Trust's internal Financial Regulations and the Academy Trust Handbook
- Ensure all purchasing within the Trust provides transparent and accurate records for management, Board and audit evaluation
- Have appropriate contract management processes in place to ensure services that have been procured are delivered to the agreed specification and standards.

3. **Organisation**

The CFOO will ensure effective arrangements are in place for all procurement activity including the use of approved purchasing consortia. The CFOO will co-ordinate procurement, including contract negotiations, providing assistance with Tenders, maintaining supplier relationships and developing preferred supplier lists, and to ensure compliance with all Internal Financial Regulations and procurement regulations.

The Chief Finance & Operations Officer (CFOO), Financial Controller (FC) and Academy Principals are responsible for ensuring Academies raise purchase orders through the central Finance function. The Academy Principal will ensure their academies adhere to this policy and the Trust's Financial Regulations.

Budget holders, with the assistance of the Academy Administrators, are responsible for raising any purchasing requirements with the Finance Team. The Finance Team will abide by procurement regulations and/or the Trust's Financial Regulations to follow a tendering procedure.

4. Best Value

The Trust is committed to improving the economy, efficiency and effectiveness of its activities. All procurement of goods, works and services will follow best value principles (VFM), having due regard to priority, regularity and the Trust's legal obligations.

VFM is defined as the optimum combination of whole life costs and quality.

The Trust will consider all reasonable procurement options and any suitable hybrid/alternatives, to ensure best value is secured from all procurement of goods, works and services.

The Trust promotes economy, efficiency and effectiveness in its expenditure and it will seek to ensure that competition supports this where possible. Goods, works and services will be purchased from a mixed economy of suppliers from the public, private, voluntary and community sectors, according to which supplier offers the best VFM. The Trust will give local suppliers, where possible, every reasonable opportunity to bid for its business.

The Trust's Accounting Officer has a responsibility to ensure that the Trust secures value for money from the use of public funds and can demonstrate that resources are deployed effectively, efficiently and economically.

5. Health and Safety

The Trust recognises and accepts its responsibility as an employer for providing a safe and healthy workplace and working environment for all its employees.

The Trust must be mindful of the health and safety issues when contracting in goods, works and services.

The Trust will ensure, where possible, that it only offers contracts to companies that can provide the following for work they are to undertake (where relevant):

- Accident statistics
- Risk assessments
- Internal H&S policies

- Public and Liability insurances
- H&S assured & accredited
- CHAS registered/approved where relevant
- CDM Regulation 2015
- Child Protection/Safeguarding Policy

This will ensure the safety of Trust staff and pupils.

Where suppliers have access to Trust systems, personal data or network infrastructure, appropriate information security and data protection checks must be completed. This may include assessment of Cyber Essentials certification, data processing arrangements, information security policies and compliance with UK GDPR.

6. Goods or Services Provided by Related Parties (related party transactions)

The Trust must pay no more than 'cost' for goods or services provided to it by the following persons ('services' do not include services provided under a contract of employment):

- Any Member/Trustee of the Trust;
- Any individual or organisation connected to a Member/Trustee of the Trust

All Members, Trustees and senior employees with budgetary control are required to complete a register of interest to be updated at least annually.

A central list of connected individuals/organisations is maintained by the Finance and Governance Teams.

Any transaction with a connected party must be:

- Properly procured through an open and fair process
- Supported by a statement of assurance from the connected party to the Trust confirming that their charges don't exceed the cost of goods or services.
- Be on a basis of an open book agreement including a requirement for the supplier to demonstrate clearly, if requested, that their charges do not exceed the cost of supply.

Exceptional payments may be made to Members, Trustees, or Governors (or any partner or connected person of his or hers) for them acting in a professional capacity on behalf of the Trust in accordance with the Finance Regulations.

The Academy Trust Handbook provides specific details/requirements for transactions with connected individuals/organisations. The CFOO and/or CEO must be consulted prior to entering into any related party transaction, including where the budget holder is in any way uncertain as to the potential for such a relationship with a provider.

The Trust must manage conflicts of interest appropriately and ensure that all related party transactions comply with the Academy Trust Handbook. Transactions with related parties must be conducted at cost unless expressly permitted by the Handbook and must be reported or approved through the Department for Education's Related Party Transactions process where required.

Any individual involved in specifying requirements, obtaining quotations, evaluating tenders, recommending suppliers or approving expenditure must declare any actual, potential or perceived conflict of interest as soon as it becomes known. Such declarations must be recorded in writing and considered by the CFOO or appropriate senior leader. Where necessary, the individual shall withdraw from the procurement process and take no part in the evaluation, recommendation, approval or award of the contract. The Trust will maintain appropriate records of all declared procurement-related conflicts of interest.

7. Authority to Purchase

Staff responsible for purchasing should be familiar with the relevant sections of the Trust's Financial Regulations and Procedures.

The Board approves the budget for the financial year, thus allocating funds and delegating authority to make purchases from these funds.

Authority to place orders can only be formally delegated to other named responsible staff by the Budget Holder, in writing or by email, in accordance with the Financial Regulations.

Purchase orders must be issued prior to receiving the supplies, work or services and must be issued for all expenditure excluding those deemed Exempt in the Financial Regulations, Purchasing Card and Petty Cash transactions.

Budget Holders (or their nominated representatives) are not authorised to commit the Trust/Academy to any expenditure without ensuring that sufficient funds are available to meet the purchase cost of the goods or service. All purchases must conform to Financial Regulations and procedures at all times.

The CFOO must sign all contractual documents following prior approval in accordance with the Finance Regulations. The Finance Team will monitor contracts over £10,000 and these will be contract managed as appropriate.

Wherever practicable, no individual shall be responsible for raising, approving, ordering, receiving and authorising payment for the same transaction. Appropriate segregation of duties shall be maintained to reduce the risk of error, fraud or impropriety.

8. Leasing Agreements

Lease agreements cannot be entered into without prior approval from the CFOO, who will ensure that any necessary DfE consent is obtained. As a rule, the Trust does not enter into finance lease arrangements, which represent a form of borrowing seldom permitted by the

DfE. Only with prior DfE consent are Trusts permitted to enter finance leases, hence all alternative avenues should be exhausted prior to such receiving consideration.

9. Purchasing Procedures

All new suppliers must be approved by the Finance Team prior to being set up on the Finance System. A new supplier may be subject to a financial check if considered necessary which could result in the supplier being rejected.

All purchases must be made via an approved official Trust purchase order. The order must clearly indicate the nature of the goods or service and if applicable refer to any agreed price, quotation or Tender submitted.

Maintenance agreements should be co-ordinated to take advantage of a Supplier's ability to undertake work on all or a significant proportion of similar Trust equipment with a view to aiding Trust VFM and efficiency.

The ability of a Supplier to meet the Trust's requirements should be assessed before any contract is awarded or an order placed. The Finance Team will be responsible for examining a supplier's conditions of sale to ensure they do not materially prejudice the Trust.

10. Quotations and Tenders

All Orders (Revenue & Capital) excl. VAT	Process
Up to £5,000	Achieve VFM (minimum 1 quote)
£5,001 to £25,000	Minimum of 3 quotes, or use Trust approved preferred supplier
£25,001 to £75,000	Formal competitive quotation process
Over £75,000	Formal tender or compliant framework route
Above Procurement Act thresholds	Public procurement process and specialist advice

The local quotation and tender thresholds within this policy shall be reviewed periodically by the Board to ensure they remain proportionate to the Trust's size, complexity and risk profile.

Purchases or contracts must never be artificially split into a number of lower value orders to avoid a quotation or Tender threshold.

Only in exceptional circumstances should contracts/agreements with a value in excess of £5,001 be awarded without at least three suppliers being invited to quote.

For orders in excess of £5,001 the Finance Team must retain evidence of quotes obtained (minimum of three) and be able to demonstrate value for money for a period of 2 years.

All purchase orders over the value of £10,001 must have included a statement detailing the process that has been followed to demonstrate best value was gained from the process. The

statement should include, where possible, companies that responded to any tender or quote that was released, the costs they submitted and the reason, should it not be entirely on price, that a company was appointed. An explanation should also be included where quotes haven't been sought and a single supplier has been approached.

Procurement with a value in excess of £75,000 must follow the Trust's Tendering procedure as outlined in the Financial Regulations.

In exceptional circumstances, where it is not possible or appropriate to obtain the required number of quotations or undertake a competitive tender process, a procurement waiver may be approved in accordance with the Scheme of Delegation and Financial Regulations.

All waivers must:

- be documented;
- include the justification;
- demonstrate value for money;
- identify any risks arising from the waiver;
- be approved before commitment to expenditure wherever possible.

A register of procurement waivers shall be maintained by the Finance Team and reported periodically to the Finance, Audit and Risk Committee.

Tender and quotation evaluation should take account of all relevant costs, including acquisition, servicing, performance, maintenance, compatibility and disposal.

Wherever better value can be obtained, purchasing contracts made available by an approved purchasing framework must be used.

Maintenance and lease agreements must also conform to Financial Regulations and Procedures and Tendering guidelines. When determining Tender thresholds the annual value and duration of the agreement must be taken into account.

The Trust shall comply with all applicable public procurement legislation and use the Find a Tender Service where required by law. The Trust shall comply with current public procurement legislation and the applicable procurement thresholds in force at the time of procurement. The CFOO shall ensure that procurement activity is conducted in accordance with the Procurement Act 2023 and any subsequent regulations or guidance.

The thresholds above are based on a 4 year spend, unless it is deemed that the product/service required will be needed beyond that period i.e. if it is expected we will need a service for 6 years, the total spend for that period is to be used.

11. Tendering Procedures

Under Trust Financial Regulations competitive tendering must occur for all procurement exceeding £75,000. Where the value is above procurement thresholds the tendering process

must be undertaken with guidance from the CFOO, ensuring regulatory tendering requirements are followed.

Except in the case of specialist supplies where alternatives are not available (or in emergency situations) at least 3 suppliers are required to Tender.

Invitations to Tender will be sent by letter and/or electronically by e-mail once approved.

The invitations to tender will include:

- an introduction/background to the project;
- the scope and objectives of the project;
- any technical/ specific requirements (e.g. H&S policies, child protection issues, meeting attendance etc);
- implementation details for the project;
- reference requests;
- brief details of evaluation criteria;
- a record of tenders will also be completed and signed by the person present at the opening;
- the terms and conditions of the tender; and
- the form and date of response to the Trust, or in the case of building works, to the architect or quantity surveyor.

Tenders may be submitted electronically through an approved procurement portal or secure trust-designated email process. The integrity and confidentiality of submissions must be maintained until the opening date and time.

All tenders will be opened at the same time (date stamped) and details of the supplier/contractor, quotation and any other details recorded at the time of opening. Attendees at the opening must be in line with the Finance Regulations.

No contractor will be allowed to amend the tender after the time fixed for receipt. The closing date must be strictly adhered to.

A separate correspondence file for each tender will contain copies of all correspondence or other relevant information.

Provided the expenditure is included in the budget, the decision as to which tender to accept will be taken in accordance with the scheme of delegated authority.

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 CFOO, then the relevant body in accordance with the Scheme of Delegation.

The decision to opt for a particular supplier must be taken with due consideration to both the tender price, quality of service and cost effectiveness. If the lowest tender price is not accepted a written record of the reason will be recorded in the relevant Tender report.

Post Tender negotiations may be conducted in limited circumstances to benefit the Trust and only in such a manner as to be equitable to all tenderers. The reason for any post Tender negotiation must be detailed in writing and retained on file.

The CFOO will arrange for the evaluation of tenders and will be fully involved in post Tender negotiations, if required.

Successful tenderers will be informed in writing and standard documentation will be used to inform unsuccessful Tenders. Feedback will always be given to unsuccessful tenderers who request it, to help improve future bid quality and competition going forward.

Procurement and tender records will be retained in accordance with the Trust's Data Retention Schedule and for a minimum of seven years following contract completion.

If a framework from a consortia is to be used to purchase any goods or services, any restrictions on that framework must be adhered to. Support and advice on any restrictions can be sought from the framework managers and/or the CFOO.

Acceptance of Tender

The following points will be considered when deciding which tender to accept:

- The overall price and the individual items or services which make up that price.
- Whether there are any 'hidden' costs; that is additional costs will have to be incurred to obtain a satisfactory product.
- Whether there is scope for negotiation, while being fair to all tenderers.
- The qualifications and experience of the supplier, including membership of professional associations.
- Compliance with technical requirements of the tender.
- Whether it is possible to obtain certificates of quantity.
- 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.
- The financial status of the supplier.
- References from other establishments.
- 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.

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

12. Procurement Approval and Reporting

The CFOO shall maintain oversight of significant procurement activity and provide periodic reports to the Finance, Audit and Risk Committee setting out:

- contracts awarded above delegated limits;
- waivers from procurement requirements;
- related party transactions;
- contract extensions;
- significant procurement risks; and
- upcoming procurement exercises.

13. Contract Management

All contracts shall have an identified contract owner responsible for:

- monitoring supplier performance;
- reviewing value for money;
- ensuring contractual obligations are met;
- maintaining appropriate records;
- assessing the continuing need for the contract;
- planning timely re-procurement where required.

The Trust shall maintain a central Contract Register containing key contract information including contract value, duration, renewal dates, contract owner and procurement route.

Contract extensions shall only be approved where permitted by the original contract or procurement process and following a documented assessment of value for money and ongoing service requirements.

14. Sustainable Purchasing

The Trust will consider environmental and social responsibility as a factor in all of its purchasing decisions and recognises its responsibility to carry out its purchasing activities in a sustainable manner.

Before buying any product or service the following questions should be asked:

- Is the product or service required?
- Can the need be met in any other way?
- Is a suitable product available elsewhere in the Trust?
- Can we meet this requirement by renting, leasing or sharing rather than buying?
- Is the specification right? Is it “fit for the purpose”, the appropriate quality (not over or under specified) and the correct quantity?
- Can the product serve any useful purpose after its initial use?

Wherever **possible** the Trust will give preference, where items are of a similar cost, to those that are:

- Manufactured with a high-recycled content

- Biodegradable or able to be recycled or reused
- Energy, water and resource efficient
- Packaged appropriately, not excessively using packaging that is not recyclable or reusable
- Non-polluting during production, working life and on disposal
- Durable, easily upgraded and repairable
- Not categorised as Special Wastes entailing additional disposal costs and procedures.

From Suppliers:

- Who are based locally
- Who are committed to environmental transparency and improvement
- Who do not exploit child labour or labour and economies in the developing world and adhere to Fair Trade Standards
- Who supply environmental handling and disposal information.

Procurement exercises should consider wider social value outcomes where relevant, including community benefit, environmental sustainability, local economic contribution, employment opportunities and support for disadvantaged groups.

15. Disposal of Surplus Equipment

Any disposal of assets must conform to Trust Financial Regulations and Procedures.

16. Code of Ethics

Any personal or family interests which may impinge or might reasonably be deemed by others to impinge upon the impartiality of any matter relevant to purchasing duties must be declared.

The confidentiality of information received in the course of duty should be respected and specific details of suppliers offers must not be divulged to competitors. Information given in the course of duty should be true and fair and never designed to mislead and must not be used for personal gain.

Whilst bearing in mind the advantages to the Trust in maintaining a continuing relationship with a supplier, any arrangement which might, in the long term, prevent the effective operation of fair competition must be avoided.

Business gifts, other than items of small intrinsic value such as business diaries or calendars should not be accepted. Items for personal use may not be accepted.

Modest hospitality is an accepted courtesy of a business relationship, however this must be cleared by the CFOO in advance. The recipient should however be conscious of the need to avoid a position where they might be, or appear to be, influenced in making a business decision by such hospitality.

The frequency and scale of such hospitality should not be significantly greater than the Trust would be likely to provide in return.

When it is not easy to decide between what is and what is not acceptable in terms of gifts or hospitality the offer should be declined or advice sought from the CFOO. For the protection of those involved the Trust Finance Team will maintain a register of all gifts and hospitality received. Members of staff in receipt of such gifts or hospitality are obliged to notify the Finance Team immediately.

Any suspected fraud, bribery, corruption, collusion, bid-rigging or irregularity relating to procurement activity must be reported immediately in accordance with the Trust's Whistleblowing Policy, Anti-Fraud Policy and Financial Regulations.

17. Linked Policies and Procedures

Financial Regulations and Procedures

18. Equality Impact Statement

The Equality Act 2010 requires public bodies, in carrying out their functions, to have due regard to the need to:

- eliminate discrimination and other conduct that is prohibited by the Act
- advance equality of opportunity between people who share a protected characteristic and people who do not share it
- foster good relations across all characteristics - between people who share a protected characteristic and people who do not share it.

In the development of this policy due regard has been given to achieving these objectives, further to which we will champion equality in all its forms, in keeping with our values.