



**Watford Grammar School for Girls**

# **Competitive Tendering Policy**

<b>This policy adopted by Board of Governors</b>	<b>26<sup>th</sup> November 2018 29<sup>th</sup> November 2021</b>
<b>Next review date</b>	<b>November 2024</b>
<b>Committee Responsible</b>	<b>Resources</b>
<b>Reviewed by Committee</b>	<b>15<sup>th</sup> November 2024</b>
<b>STATUTORY</b>	

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## 1. Purpose, Scope and Principles

The purpose of the policy is to provide a framework for the Governors and Headmistress for all formal tendering processes and to ensure that the School has a fair and transparent process for large expenditure items; that work and services are provided on fair, open and best value basis.

## 2. Legislation and Guidance

The Department for Education (DfE) has [published buying guidance for schools](#). It suggests the following thresholds for low, medium and high-value purchases:

- Low-value purchase: under £10,000
- Medium-value purchase: £10,000 - £40,000
- High-value purchase: over £40,000 but below the EU threshold

The current EU threshold for all goods and most services is £189,330. Purchases above this threshold must follow the EU procurement process.

Services "used solely for the purpose of delivering education" are subject to the higher 'light touch regime' threshold of £663,540.

NB. DfE Guidance still refers to [EU thresholds](#). The policy may be subject to change based on further updated guidance. DfE Guidance as updated 10<sup>th</sup> November 2021.

## 3. Tender limits

The Governing Body has agreed that all goods/services ordered with a value over £50,000 or for a series of contracts over a 3 year period which in total exceed £50,000, must be subject to a formal tendering procedure with 3 tenders required. Additionally the Governing Body has agreed that a minimum of 4 tenders are obtained for purchases and contracts valued between £500,000 and EU limits. (exc DfE CIF bidding process which requires 3 only)

The school may also use the [Find a Tender](#) service to search for high-value opportunities or awarded contracts, typically over £122,976.

## 4. Types of Tender

Tenders can be open, restricted, negotiated. In deciding the type of tender procedure to be used, consideration will

be given to the number of providers/suppliers available, time constraints and the costs involved in each tender process.

The Resources Committee will take advice from the School's project manager before deciding the type of tender process.

## 5. Tendering Procedure

- 5.1. A [specification](#) will be produced.
- 5.2. Suppliers will be invited to tender by advertisement, personal contact or through the Find a Tender service.
- 5.3. A closing date will be set by which all tenders must be received
- 5.4. Tenders received will be stored securely unopened until the closing date
- 5.5. Invitations to tender/tender documents will be sent out
- 5.6. All tenders of the following anticipated amounts will be opened at the same time in the presence of the required staff
  - 5.6.1. £50,000- £499,999 – Business Director, Budget Holder and a member of the Finance Office or appointed (GB approved) 3<sup>rd</sup> party professional advisors
  - 5.6.2. Over £500,000 – Member of the Governing Body, Head and Business Director or appointed (GB approved) 3<sup>rd</sup> party professional advisors
- 5.7. A record will be established to document the tenders received –(name of company and amount of tender) and any tenders to specific suppliers where they declined to quote
- 5.8. Each tender will be evaluated against a predetermined set of criteria
- 5.9. Full records of the criteria used for evaluation will be kept, together with the minutes of the evaluation meeting
- 5.10. Interviews will be carried out
- 5.11. Reports will be prepared following the evaluation process
  - £5,000 - £49,999 a report highlighting the relevant issues and documenting the decision taken (with the exception of County approved suppliers and those used for trips and visits)
  - £50,000- £499,999 a report highlighting the relevant issues and recommending a decision to the Resources Committee for their authorisation (with the exception of County approved suppliers and those used for trips and visits)
  - £500,000 or above - a report (forwarded by the Headmistress) highlighting the relevant issues and recommending a decision to the Governing Body for their authorisation (with the exception of County approved suppliers and those used for trips and visits)
- 5.12. Procurement decisions made by the Governing Body or Resources Committee will be recorded in their minutes
- 5.13. All documentation relating to the process will be held by the Budget Holder

## 6. Two Stage Tender Process

If a two stage tendering process is to be followed then the companies providing tenders will be invited to attend an interview, a member of the Resources Committee will be present at the interviews. Once a decision has been made using step 10 above the preferred supplier will be invited to work with the School to develop the project. This is not contractually binding at this stage.

## 7. Insufficient tenders

It may be that in some cases and for certain services there is a sole provider. In such cases as well as demonstrating and evidencing that this is the case, alternative tests will need to be applied to ensure that value for money is obtained. These might include benchmark comparisons with similar services and comparisons with services that may be on offer elsewhere in the country. This will all need to be evidenced for audit purposes.

## 8. Conflicts of Interest

Staff and Governors involved in the tendering process should disclose all interests, business and otherwise, that might impact upon their objectivity. If there is a potential conflict of interest then that person must withdraw from the tendering process.

Those involved in making a decision must take care not to accept gifts or hospitality from potential suppliers that could compromise or be seen to compromise their independence.

