



**OUR LADY
OF LOURDES**

CATHOLIC MULTI-ACADEMY TRUST

Procurement Policy



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1. Aims and scope

This policy aims to ensure that:

- The CMAT's funds are used only in accordance with the law, its articles of association, its funding agreement and the Academy Trust Handbook
- The CMAT's funds are used in a way that commands broad public support
- Value for money (economy, efficiency and effectiveness) is achieved
- Conflicts of interest are managed adequately and appropriately
- The CMAT has open and transparent procurement procedures
- All staff involved in procurement are aware of the procedures they must follow
- Procurement procedures are compliant with procurement legislation

This policy includes procedures for open tenders. This approach allows anyone to submit a bid to supply goods or services required and offers an equal opportunity to any organisation to submit a proposal.

2. Legislation and guidance

This policy is based on:

- [The Academy Trust Handbook](#)
- [Department for Education \(DfE\) guidance on buying procedures and procurement law](#)
- [Procurement Act 2023](#)

This policy also complies with the CMAT's funding agreement and articles of association.

3. Purchase thresholds

3.1 de minimis level

Multiple quotes do not need to be obtained for services or goods with a value up to £9,999, however it is the responsibility of the budget holder to ensure best value has been obtained.

3.2 Low to high-value purchase thresholds

Purchase levels are divided into the following:

- Low-value purchase: £10,000 – £50,000 (minimum of 3 quotes)
- Medium-value purchase: £50,000 – £100,000 (Tender process)
- High-value purchase: over £100,000, but below the public procurement threshold (Advertised Tender)

3.3 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 CMAT will seek advice to ensure it runs a buying process compliant with the Procurement Act 2023. The current threshold for all goods and most services is **£214,904 inclusive of VAT**.

A 'light touch contract', with a higher threshold of **£663,540, inclusive of VAT**, applies for some services that are specifically for education provision. We will seek legal advice to determine if any procurement run by the CMAT qualifies.

4. Approval authority

CONTRACT LEVEL	CONTRACT VALUE	APPROVAL LEVEL
De minimis	Up to £9,999	Up to £1,000 - Budget holder (Secondary School) / Headteacher (Primary School)
		Up to £1,000 - £2,000 - Headteacher (Secondary School) / Budget Partner (Primary School)
		£2,000 to £9,999 – Budget Partner
Low	£10,000 – £49,999	Head of Finance
Medium	£50,000 – £99,999	Head of Finance
High	Over £100,000, but below the public procurement threshold	COO or CEO
Over the public procurement threshold	Over £214,904	Finance committee
'Light touch'	Over £663,540	Finance committee

5. Preparing to buy

To secure best value and maintain records of the decision-making process, all staff involved in procurement decisions must follow this process for each new procurement.

5.1 Written specification

This is required for all purchases over the de minimis level.

The specification should set out relevant requirements, including:

- Product/works/service description
- Technical specifications
- Quantity
- Quality

➤ Delivery schedule

For higher value purchases, it may be appropriate to conduct soft market testing by speaking to suppliers at this stage. Any information provided to suppliers at this stage will also be shared with suppliers who bid later. The specification will not favour the suppliers we have spoken to.

5.2 Contract valuation

The value of a contract will be determined by calculating the estimated whole-life value of the goods, works or services, including:

- The price of the goods, works or services
- VAT
- Delivery charges
- Ongoing maintenance costs
- Running costs
- Cost of removing and disposing of an item or service when it's no longer required

For fixed term contracts with an option to extend the term, the value of the contract will be the price of the fixed term plus the potential extension period.

We will not divide a single contract into smaller contracts to bypass the purchase thresholds (see section 4).

The cost will affect which buying process we use.

5.3 Business case

A business case will be required for purchases over £50,000. This must be approved by the relevant delegated authority.

The business case should include:

- Draft specification
- Estimated cost
- Opportunities to work with other schools/trusts

5.4 Identify route to buy

Following DfE guidance on buying for schools (see section 2), we will follow one of the five routes to buy, according to the value of the contract.

- **Route 1:** framework agreement (all values)
- **Route 2:** use catalogues (low value)
- **Route 3:** get quotes from at least 3 suppliers (low value)
- **Route 4:** run a buying process for (for medium and high value below public procurement threshold)
- **Route 5:** run buying process compliant with Procurement Act 2023 (high value above public procurement threshold)

Routes 3, 4 and 5 will only be used if we cannot meet our requirements through a framework agreement.

See section 6 for more detail on each route.

6. Routes to buy

6.1 Framework agreements (route 1)

Where possible, we will use a framework agreement to contract suppliers for purchases of all values.

Framework agreements are arrangements that a contracting authority, such as a public sector buying organisation, makes with suppliers. Framework agreements are the preferred route, as:

- They have already been through a competitive tender process
- They have favourable terms and conditions
- 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, where we will ask each supplier to submit their bid and we will then select the best one. 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.

The decision to use a framework agreement and which framework to use must be approved in line with the delegated authority outlined in section 4 of this policy.

6.2 Catalogues for purchasing low value goods (route 2)

To buy goods under the low value threshold, we will use catalogues to compare similar products and choose the supplier that meets our requirements and offers best value for money.

If possible, we will use the following DfE-approved catalogues:

- [CCS purchasing platform](#) – technology products including laptops, smartphones, accessories and software, and office machines that print, scan, or copy (multi-functional devices)
- [ESPO](#) – a range of goods including stationery, art and crafts, classroom resources, furniture, office essentials, presentation and display equipment
- [YPO procurement product catalogue](#) – a range of products from UK suppliers, including pens and paper, storage, computers, audio visual equipment, and furniture

Staff are also free to carry out their own research and find alternative suppliers, if these offer better value for money.

Approval for the purchase should be sought from the budget holder and delegated authority before placing any orders with the chosen supplier.

6.3. Getting quotes for low value purchases (route 3)

We will use this process if we cannot meet our requirements through a framework or a catalogue.

We will secure quotes from at least 3 suppliers. These will be assessed following the process set out in section 7.

All suppliers will be provided with the same information which will include:

- The specification

- Date by which we require the quote
- When our decision will be made
- How the supplier can ask questions about what we're buying or our process
- If needed, a link to the CMAT's terms and conditions

6.4 Tendering procedure for medium and high-value purchases under the public procurement threshold (route 4)

The CMAT will only follow this process if our needs cannot be met through a framework agreement. Before proceeding, we may seek advice.

To ensure we secure good value, we will follow DfE guidance (see section 2) and seek specialist support as necessary.

High Value

To initiate the procurement the CMAT will publish a tender notice. This notice will be publicly accessible and provide details of the following:

- The specification
- Evaluation criteria
- Submission deadlines, including timeframe for the clarification period

The tender notice will be published at least 30 days before the submission deadline to ensure adequate time for suppliers to prepare their bids.

There will be a clarification period of 14 days to allow potential suppliers to seek clarification on the procurement requirements and seek further information. Suppliers must submit their questions in writing. Where permitted to do so, all questions and responses will be documented and shared anonymously with all interested suppliers to ensure transparency and equal access to information.

Tenders will be assessed following the process set out in section 7.

6.5 Tendering procedure for high-value purchases over the public procurement threshold (route 5)

The CMAT will only follow this process if our needs cannot be met through a framework agreement. Before proceeding, we will seek advice to ensure that the process the school runs is compliant with the Procurement Act 2023.

We will follow DfE guidance (see section 2) and seek specialist support as necessary.

All members of staff involved in this process must have completed the appropriate [training on the Procurement Act 2023](#).

Tenders will be assessed following the process set out in section 7, taking into account appropriate legal advice and additional requirements for purchases over the public procurement threshold.

7. Assessing bids

Before beginning a buying process that requires quotes or bids to be assessed (routes 1, 3, 4 and 5), we will determine appropriate award criteria to decide which bid best meets the specification and delivers factors such as price and quality.

The exact criteria will vary depending on the chosen procurement route. For purchases over the public procurement threshold (route 5), we will seek advice at this stage to ensure we meet the additional requirements for assessing bids.

Each criterion will be assigned a:

- Range of scores – such as 1 to 5, with 5 the highest
- Weighting – a figure to multiply the score depending on the importance of the criterion

Using the criteria, bids and quotes will be assessed independently by at least 2 members of staff, who will then compare scores, discuss any differences and reach a final agreed score.

Bids must be submitted by the deadline specified in the tender notice. Any late submissions will not be considered.

We will:

- Not open any bids/quotes before the deadline
- Treat all bids/quotes fairly and equally
- Record how decisions are made
- Keep confidential, secure, auditable records
- Award the contract to the highest scoring bidder

7.2 Notification of Award

We will notify both successful and unsuccessful bidders in accordance with the notification requirements specified in the applicable guidance for procurements below and above the threshold.

7.3 Contract finalisation

We will work closely with the winning bidder to ensure a smooth transition from the bidding process to contract execution.

There will be no commitments and no work shall begin until both parties have signed the contract.

8. Conflicts of interest

All staff that are involved in an evaluation of a tender exercise, must complete a Conflict of Interest Declaration prior to receiving the tender submissions to ensure any conflicts are identified and they can be managed appropriately.

Depending on the nature of the conflict, it may be appropriate to exclude the person declaring the conflict from the supplier evaluation or decision-making process.

More information on conflicts of interest can be found in the Bribery and Corruption Policy.

In accordance with the CMAT's fraud policy, all Directors, Governors and Staff must complete an annual declaration to enable the CMAT to capture relevant business and non-pecuniary interests including:

- directorships, partnerships and employments with businesses
- trusteeships and governorships at other educational institutions and charities

For each interest the following information must be recorded:

- the name of the business;

- the nature of the business;
- the nature of the interest;
- and the date the interest began

All related parties are added to a Trust-wide register and published on the CMAT's website. Where contracts are awarded to companies who the Members, Directors or staff have made a declared of interest, there is a requirement to notify the DfE in advance and to seek DfE approval for those contract that exceed £20,000 either individually or cumulatively.

9. Raising orders

All orders must be submitted using the CMAT's online purchase ordering software.

Orders must be placed prior to any invoices being received or delivery of any goods made. The CMAT operates on a 'no PO no pay' basis.

Verbal orders should only be made in cases of emergency and must be followed as soon as is practical by an official electronic order.

Only goods, services and works required by the CMAT and its Schools are to be ordered.

Orders must represent value for money and where appropriate the right competition should be applied in respect to numbers of quotes/tenders obtained.

Orders should only be made with Approved suppliers and any requests for new suppliers must be directed to the finance team prior to orders being agreed.

All orders must represent the entire value of the requirement including any delivery/service charges.

All orders must be approved in advance of the order being submitted to the supplier and in line with the delegated approval limits applicable to the whole life cost of the requirement. Orders should not be broken down to circumvent the correct delegation of authority.

All requisitioners should ensure the goods, works or services received are in accordance with those ordered.

Requisitioners MUST electronically record the receipt of the goods/services on the online purchase ordering system in order for invoices to be paid promptly.

Invoices MUST be submitted electronically to the Central Finance Team for payment directly from suppliers. Where an invoice is received by a school, it should be scanned and uploaded to the Finance Portal as soon as it is received.

All invoices MUST contain a valid purchaser order number. Invoices received without a valid purchase order number will be returned to the supplier and not paid.

Specific exemptions to the requirement to raise an official purchase order are limited to:

- Rent or business rates
- Utility costs
- Purchasing card transactions

No orders shall be placed, or contracts altered or extended, with the intention of avoiding the relevant thresholds applicable within these Financial Regulations. If the terms of any purchase order or contract need to be amended, an official variation order or contract amendment document, must be approved in accordance with the Scheme of Delegation.

10. Managing contracts

We will seek advice before entering into a contract.

The CMAT maintains a contract register that is regularly shared with the finance and estates committee to make them aware of any upcoming milestones and provide them an opportunity to scrutinise and, if necessary, challenge procurement plans.

11. Record keeping

Records will be kept securely, only for as long as necessary and in line with data protection law, our privacy notices and our data retention policy.

Records relating to procurement processes over the public procurement threshold must be kept for at least 3 years from the date of the award of the contract.

12. Monitoring arrangements

The finance and estates committee is responsible for the implementation of this policy.

This policy will be reviewed and approved by the board every 2-years. It will also be reviewed whenever public procurement thresholds or legislation changes.

Date Issued	June 2025
Date of Review	June 2027
Reviewer	Finance and Estates Committee
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