

HORIZONS EDUCATION TRUST

Procurement Policy

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1.0 AIMS & SCOPE

1.1 This policy aims to ensure that:

- Value for money (economy, efficiency and effectiveness) is achieved
- Conflicts of interest are managed adequately and appropriately
- The school has open and transparent procurement procedures

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

2.0 LEGISLATION & GUIDANCE

2.1 This policy is based on:

[Department for Education \(DfE\) guidance on buying procedures and procurement law](#)
[The Public Contracts Regulations 2015](#)

3.0 ROLES & RESPONSIBILITIES

3.1 The Board

The board will ensure that:

- The trust has achieved value for money.
- Relevant legal or professional advice (such as an external auditor) is used, where appropriate.
- Any conflicts of interest that may arise are managed.
- A register of the up-to-date business and pecuniary interests of trustees and the trust and academies leadership teams is kept, helping to ensure the board is transparent and open.
- Where any trustee has a pecuniary interest in a procurement decision, they exclude themselves from the process and records (e.g. meeting minutes) show they had no influence on the decision.

3.2 Budget Holders

Budget Holders are responsible for:

- Overseeing and supporting competitive tendering
- Providing information to the governing board, as appropriate
- Monitoring budgets

4.0 PURCHASE THRESHOLDS

4.1 Low to High-Value Purchase Thresholds

Purchase levels are divided into the following:

- Low-value purchase: £500 – £2,000
- Medium-value purchase: £2,001 – £50,000
- High-value purchase: over £50,001, but below the PCR procurement threshold

4.2 PCR Procurement Threshold

If it is estimated that the cost of a contract is above the PCR threshold for procurement spending, the school will seek legal advice to ensure it runs a PCR compliant buying process. The current PCR threshold for all goods and most services is £214,904

5.0 APPROVAL AUTHORITY

CONTRACT LEVEL	CONTRACT VALUE	DELEGATED AUTHORITY
De minimis	Up to £500	One verbal quote, approved based on the delegated authority listing
Low	£501 – £2,000	One written quote, approved based on the delegated authority listing
Medium	£2,001 – £50,000	£2,001 – £5,000 Two written quotes, approved based on the delegated authority listing £5,001 – £50,000 Three written quotes, approved based on the delegated authority listing
High	Over £50,001, but below the PCR procurement threshold	Formal Tendering Process
Over the PCR procurement threshold	Over £214,904	Board of Trustees
'Light touch regime'	Over £663,540	Board of Trustees

6.0 FRAMEWORK AGREEMENTS

- 6.1 Where possible, we will use a framework agreement to contract suppliers. These are arrangements that a contracting authority, such as a public sector buying organisation, makes with suppliers.
- 6.2 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.
- 6.3 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.
- 6.4 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.

7.0 VALUING CONTRACTS

- 7.1 The value of a contract will be determined by calculating the estimated whole-life value of the goods, works or services, including any related fees.
- 7.2 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.
- 7.3 We will not divide a single contract into smaller contracts to bypass the purchase thresholds (see section 4).

8.0 EVALUATING TENDERS

- 8.1 Tenders will be evaluated against the criteria and weighting outlined in the tender document. This criteria will include:
- **Cost**
 - **Quality including Qualification and Experience of the Supplier**
 - **Delivery**
 - **Performance**
 - **Risk**
- 8.2 We may specify additional criteria based on the type of tender, as outlined in the tender document.

9.0 TENDERING PROCEDURE: LOW AND MEDIUM-VALUE PURCHASES

- 9.1 When making low or medium-value purchases without a framework agreement, the trust will use the process outlined below.
- a) Create a specification:**
Will set out what suppliers need to understand about what we are looking to buy, including the quality, quantity and delivery date
 - b) Compare suppliers**
 - c) Assess quotes:**
An award criteria will be developed to assess suppliers' quotes. Criteria may include:
 - How well the supplier meets our specification
 - The whole-life cost of the contract, which may include:
 - Maintenance costs
 - Running costs
 - The cost of removing and disposing of an item or service once we no longer need it
 - Value for money

Quotes will be evaluated by the relevant Budget Holder.

When we contact suppliers, we will send them:

- The specification
- Instructions for how to ask clarification questions about the specification

d) Place an order – when the best value quote is identified, we will send the supplier a purchase order. Which includes details of the:

10.0 TENDERING PROCEDURE: HIGH-VALUE PURCHASES

10.1 The academy will make high-value purchases without a framework only in rare circumstances and will generally engage with professional support. When this does happen, we will use the process below.

1. **Create a specification** (see section 9)
2. **Assess the market** – we will prepare for the tendering process by developing our knowledge of the market. We will find out how many suppliers are available and the best way to advertise our contract to a range of suppliers
3. **Check the school's position in relation to the PCR procurement thresholds** (see section 4)
4. **Develop a contract** – a contract will include terms and conditions, service levels expected, a contract management plan and an exit strategy
5. **Establish how we will assess quotes** – we will set out criteria that will allow us to evaluate which of the suppliers' bids best meets the requirements in our specification, and is the most economically advantageous tender that best combines price and quality
6. **Create a timeline for the tender process** – this will include the dates of the clarification period, the deadline for submitting tenders and the date we expect to award the contract
7. **Prepare an invitation to tender** – this will include:
 - a. A covering letter with a timeline for the process
 - b. Instructions on how suppliers can ask clarification questions and submit their tender
 - c. The specification
 - d. A pricing schedule
 - e. The contract's terms and conditions
 - f. Contract management requirements (see 'develop a contract' above)
 - g. Award criteria, including the scoring system and any weightings
 - h. If appropriate, an invitation for suppliers to give a practical demonstration of their goods, works or services
8. **Run the tender process and provide clarifications**
9. **Evaluate tender responses** – details of the records of decision making and moderation decisions will be kept.
10. **Notify bidders** – we will inform both the successful bidder and the unsuccessful bidders at the same time
11. **Challenges from unsuccessful bidders** – if an unsuccessful bidder challenges the fairness of the contract, we will contact them to explain that we have conducted a fair process and kept good records. If they make a formal challenge, we will not formalise the contract and seek legal advice.
12. **Finalise the contract** (if there are no legal challenges) and advertise the award (if the contract was advertised in Contracts Finder or the Find a Tender service)
13. **Abandoning the tender process** – on very rare occasions we may need to halt the tender process. The tender documents should make it clear that we have the right to do so without any liability to the bidders. Should this occur, we will notify suppliers who are preparing their bids as soon as possible

11.0 RECORD KEEPING

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