



**SANCTA
FAMILIA**

CATHOLIC ACADEMY TRUST

Procurement / Competitive Tendering Policy

Internal & External Use

Policy Owner:	CFO
Review Cycle:	Annually
Date of last review:	September 2026
Date of next review:	September 2027

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Aims and Scope

This policy aims to ensure that:

- The academy trust's funds are used only in accordance with the law, its articles of association, its funding agreement and the Academy Trust Handbook
- The trust'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 trust 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.

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 our funding agreement and articles of association.

Purchase thresholds

The information in this section, except for that relating to public procurement thresholds, is based on recommendations from the DfE guidance.

de minimis level

Purchase orders do not need to be raised for services or goods with a value up to £1,000.

Low to high-value purchase thresholds

Purchase levels are divided into the following:

- Low-value purchase: £1,000 – £5,000
- Medium-value purchase: £5,001 – £50,000
- High-value purchase: over £50,001, but below the public procurement threshold

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 trust will seek legal 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 trust qualifies.

Approval authority

Contract Level	Primary Schools Contract Value	Secondary Schools Contract Value	Approval Level
CLASS 1 Low value transactions	£0 - £1,000	£0 - £2,500	Budget Holder
CLASS 2 Intermediate value transactions	£1,001 - £25,000	£2,501 - £25,000	Headteacher
	£25,001 - £50,000	£25,001 - £50,000	Headteacher/ CFO
CLASS 3 High Value	£50,001 - £100,000	£50,001 - £100,000	Headteacher approval, CFO and CEO
	£100,001 - £213,477	£100,001 - £213,477	Trust Board approval
	£213,477 +	£213,477 +	Please refer to the Trust’s Procurement/ Competitive Tendering Policy.

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.

Write specification

This is required for all purchases over the intermediate 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.

Value contract

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.

Business case

A business case will be required for purchases over £213,477. This must be approved by the Board of Directors.

The business case should include:

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

Identify route to buy

Following DfE guidance on buying for schools, we will follow 1 of the 5 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 or medium value)

Route 4: run a buying process for (for 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.

Routes to buy

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 of this policy) to ensure good practice. The reasons for the choice of framework, and for the choice of supplier, will be clearly recorded.

6.2 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 and Diocese approved catalogues:

- [Church Marketplace](#) - Created by the Catholic Church in England & Wales to enable the Catholic community to save costs by purchasing together, our free subscription entitles you to access great prices on a wide range of products and services.
- [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 before placing any orders with the chosen supplier.

6.3. Getting quotes for low and medium-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 the following section.

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 Trust's terms and conditions.

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

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

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

To initiate the procurement the trust 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 28 days before the submission deadline to ensure adequate time for suppliers to prepare their bids.

There will be a clarification period of 7 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 the next section.

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

The trust will only follow this process if our needs cannot be met through a framework agreement. Before proceeding, we will seek legal 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 the next section, taking into account appropriate legal advice and additional requirements for purchases over the public procurement threshold.

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 legal 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 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

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.

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.

Conflicts of interest

Any potential conflicts of interest should be identified before starting the procurement process. These will be managed, and alternative procedures will be considered such as:

- Asking different staff to assess bids
- Withholding the names of the companies when bids are assessed

Managing contracts

We will seek legal advice before entering into a contract.

The trust maintains a contract register that is regularly shared to be made aware of any upcoming milestones and provide Directors with an opportunity to scrutinise and, if necessary, challenge procurement plans.

Record keeping

Records will be kept securely, only for as long as necessary and in line with data protection law, our privacy notices and [records management policy/record retention schedule].

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.

Monitoring arrangements

The Finance, Audit and Risk committee are responsible for the implementation of this policy.

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

Links with other policies

This competitive tendering policy is linked to the following policies:

- Finance policies
- Investment policy
- Scheme of Delegation



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CATHOLIC ACADEMY TRUST

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Registered in England, Company Number: 15116317

UID: 17728

UKPRN: 10094584

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