



**Diocese of Worcester Multi Academy Trust
(DoWMAT)**

Competitive Tendering Policy

MAT Board Approval:	October 2017
Review Date:	Autumn 2019
Member of staff responsible:	Mrs Claire Davies

DoWMAT Vision

The Diocese of Worcester Multi Academy Trust (DoWMAT) will, through its mission statement 'to love, to learn, to serve', enable all its academies to flourish so that all stakeholders can 'live life in all its fullness'. (John 10:10)

DoWMAT Aims

To Love:

- For pupils to grow and learn in schools where, as children of God, their individual qualities are nurtured, to give them fulfilment, self-worth, the skills to contribute to society and confidence in the future
- For staff, accorded dignity and respect, to be enabled to become the very best practitioners that they can be, inspiring, sharing a joy for learning and aspiration
- For academies to be hospitable to diversity, to become the centre of their communities as places of nurture and beacons of educational excellence
- For all learning to be centred in relationships based upon compassion, generosity, truth-telling, forgiveness and reconciliation

To Learn:

- For academies to be resourced and supported so that all pupils within the DoWMAT are enabled to flourish, reaching their potential whatever their starting points
- To ensure staff and governors access high quality professional development so that standards of teaching and learning are excellent
- For academic rigour to be set in the context of rich curricular and extra-curricular opportunities for learning
- For academies to be places where explicit Christian values, collective worship, religious education and opportunities for reflection nurture the spiritual and moral growth of pupils and staff

To Serve:

- To fulfil the wider vision of the Church of England, serving our communities through the work of local academies
- To ensure academies are places of safety for pupils and staff where needs are met with dignity and respect
- To offer help and advice to those who lead our academies at all levels so that they are well equipped to face the challenges ahead
- To ensure that members, directors and trust staff understand the pressures and challenges of education in the 21st century ensuring that those leading and teaching in our academies are resourced and supported

1. Introduction

This Policy sets out the Framework for ensuring that the Diocese of Worcester Multi-Academy Trust (DoWMAT) and each of the Trust academies maintains and develops competitive tendering processes and procedures, which meet the requirements of procurement legislation, financial accountability and managing public money.

The Trust is committed to ensuring every possible action is taken to achieve value for money and to be worthy custodians of public money. The aim is to make efficiencies, including savings, and spend funds prudently in order to invest in teaching and learning.

When considering the procurement of, and tendering for goods and services, consideration should always be given to probity, accountability and value for money.

2. Forms of Tenders

There are three forms of tender procedure: open, restricted and negotiated. The circumstances in which each procedure should be used are described below.

Open Tender: This is where all potential suppliers are invited to tender. First, agreement must be reached on how best to advertise for suppliers e.g. general press, trade journals or to identify all potential suppliers and contact directly if practical. This is the preferred method of tendering, as it is most conducive to competition and the propriety of public funds.

Restricted Tender: This is where suppliers are specifically invited to tender. Restricted tenders are appropriate where:

- There is a need to maintain a balance between the contract value and administrative costs
- A large number of suppliers would come forward or because the nature of the goods are such that only specific suppliers can be expected to supply the academy's requirements
- The costs of publicity and advertising are likely to outweigh the potential benefits of open tendering.

Negotiated Tender: The terms of the contract may be negotiated with one or more chosen suppliers. This is appropriate in specific circumstances:

- The above methods have resulted in either no or unacceptable tenders,
- Only one or very few suppliers are available,
- Extreme urgency exists,
- Additional deliveries by the existing supplier are justified.

3. Preparation for Tender

Full consideration should be given to the:

- Objective of project
- Overall requirements
- Technical skills required
- After sales service requirements
- Form of contract

It may be useful after all requirements have been established, to rank requirements (e.g. mandatory, desirable and additional) and award marks to suppliers on fulfilment of these requirements to help reach an overall decision.

4. Invitation to Tender

If a restricted tender is to be used then an invitation to tender must be issued. If an open tender is used, an invitation to tender may be issued in response to an initial enquiry.

An invitation to tender should include the following:

- introduction/background to the project;
- scope and objectives of the project;
- technical requirements;
- implementation of the project;
- terms and conditions of tender and
- form of response.

5. Aspects to Consider

Financial

- Like should be compared with like and if a lower price means a reduced service or lower quality this must be borne in mind when reaching a decision
- Care should be taken to ensure that the tender price is the total price and that there are no hidden or extra costs
- Is there scope for negotiation?

Technical/Suitability

- Qualifications of the contractor

- Relevant experience of the contractor
- Descriptions of technical and service facilities
- Certificates of quality/conformity with standards
- Quality control procedures
- Details of previous sales and references from past customers.

Other Considerations

- Pre sales demonstrations
- After sales service
- Financial status of supplier. Suppliers in financial difficulty may have problems completing contracts and in the provision of after sales service. It may be appropriate to have an accountant or similarly qualified person examine audited accounts etc.

6. Tender Acceptance Procedures

The invitation to tender should state the date and time by which the completed tender document should be received by the academy / Trust. Tenders should be submitted in plain envelopes clearly marked to indicate they contain tender documents. The envelopes should be time and date stamped on receipt and stored in a secure place prior to tender opening. Tenders received after the submission deadline should not be accepted.

7. Tender Opening Procedures

All tenders submitted should be opened at the same time and the tender details should be recorded. Two persons from the following list - the Headteacher, Finance Secretary, Academy Business Manager, Chair of Governors, Chair of Resources, Trust CEO, Trust Chief Financial Officer, Academy Support officer should be present for the opening of tenders.

A separate record should be established to record the names of the firms submitting tenders and the amount tendered. This record must be signed by both people present at the tender opening.

8. Tendering Procedures

The evaluation process should involve at least two appropriate people. Those involved 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.

Full records should be kept of all criteria used for evaluation and for contracts over £25,000, a report should be prepared for the Academy Finance / Resources Committee or Trust Finance Committee, as appropriate, highlighting the relevant issues and recommending a decision. For contracts under £25,000, the decision and criteria should be reported to the Academy Finance / Resources Committee or Trust Finance Committee, as appropriate.

Where required by the conditions attached to a specific grant from the DfE, the department's approval must be obtained before the acceptance of a tender.

The accepted tender should be the one that is economically most advantageous to the academy. All parties should then be informed of the decision.

9. Related Party Transactions

All staff, Governors and Trustees must declare pecuniary interests annually and in any meetings where any issues are discussed that might involve the related organisation.