



Thinking Schools Academy Trust **“Transforming Life Chances”**

Procurement Policy

This policy was adopted	March 2026
The policy is to be reviewed	March 2028 (Every 2 years)

1 Scope

This Policy and Procedure applies to all Academies that are part of The Thinking Schools Academy Trust and all trading subsidiaries of the Trust.

2 Purchase Orders

Unless exception is explicitly given, or where clearly unreasonable, purchase orders (POs) are required for any purchases made.

Examples of purchases where POs may be unreasonable include:

- Utilities
- Emergency time sensitive health and safety works.
- Ad-hoc Agency Supply Staff to cover same day sickness or absence (where they will be on site for under 1 week)
- Canteen Raw Materials
- Childcare Vouchers
- Franking Machine updates
- ParentPay Charges
- Milk for Free School Meal children
- Photocopier usage costs / telephone/ mobile usage (plus wider items where services are not optional, are not a material cost, and cannot be reliably measured)

Purchase orders provide proof of order accuracy, and are a key part to the procurement process.

Staff are given access to the requisition system PS Purchasing to raise purchase requests. Any staff in need of access should contact the accounts team to support.

Any goods which arrive without a purchase order may be subject to return/ payment refusal.

3 Quotation and tendering

Appendix 1 details the relevant financial limits that are delegated across the organisation.

A summary of the procurement flow chart for purchases over 15K can be found in **Appendix 2**.

Unless exception is explicitly given the minimum required numbers of tenders or quotations from appropriate contractors for a given estimated value of contract are:

School Based Purchases:

- Above £5,000 and up to £15,000 at least two informal quotations
- Above £15,000 and up to £50,000, three written quotations unless justifiable reason for less quotes (e.g. Only supplier providing a certain product, clear demonstrable value in using certain supplier e.g. knowledge of TSAT), plus a Procurement Summary.

- Above £50,000 and up to £100,000, three formal quotations to be submitted in writing by a specified date and time and based on a written specification and evaluation criteria, plus a Procurement Summary.
- Above £100,000 and up to UK thresholds, four tenders, plus a Procurement Summary.
- Over UK thresholds, five tenders, plus a Procurement Summary.

Central Service Purchases (arranged with Directorate Lead)

- Above £5,000 and up to £15,000 at least two informal quotations
- Above £15,000 and up to £20,000, three written quotations unless justifiable reason for less quotes
- Above £20,000 and up to £50,000, three written quotations unless justifiable reason for less quotes (e.g. Only supplier providing a certain product, clear demonstrable value in using certain supplier e.g. knowledge of TSAT), plus a Procurement Summary.
- Above £50,000 and up to £100,000, three formal quotations to be submitted in writing by a specified date and time and based on a written specification and evaluation criteria, plus a Procurement Summary.
- Above £100,000 and up to UK thresholds, four tenders, plus a Procurement Summary.
- Over UK thresholds, five tenders, plus a Procurement Summary.

The values for Central Services purchases varies from the school level due to the increased cost of goods where procurement for basic items is made for multiple schools at a time attracting higher economies of scale.

To ensure that procurements using an operating lease maintain the principle of value for money, multiple lease quotations must be obtained unless explicit exception is given. The minimum number of operating lease quotes obtained should match the number of quotations required for the total procurement value.

The values are for single items or groups of items/projects, which must not be disaggregated artificially. The values for procurement items should be considered as:

- Excluding VAT;
- The total cumulative value of the order if the contract is for more than a single year

For tenders expected to exceed UK thresholds, UK procurement notices must also be published using the UK e-notification service, FTS (Find a Tender) and must follow The

Public Procurement (Amendment etc.)(EU Exit) Regulations 2020 with particular regard to be given to the timescale for such tenders.

Expenditure for large capital projects that goes beyond the original budget agreed can only be authorised by the Executive Committee up to a maximum of 50K or 10% of the total project budget, whichever is greater.

Project proposals must be submitted to the relevant approver/s using the Procurement Summary Template where applicable (**Appendix 3**) with all relevant quotes included. Where the minimum number of quotations required by the total procurement value has not been met, an explanation must be provided within the procurement summary, which should then be attached to the order in PSF along with any supporting correspondence with suppliers.

Purchases to be funded from revenue which were included within the original budget and where the order value is less than 50K, can be authorised by the Executive Committee up to a maximum of 50K or within a 10% increase of the budgeted figure, whichever is greater. Procurements exceeding this figure regardless of whether they have been budgeted for should follow the approval process for tender procedures.

Purchases which are made through a nationally recognised procurement framework do not have to comply with the above requirements for a specified number of quotes.

All procurements for software or services requiring a third-party to process personal data on behalf of the Trust should clearly establish the relationship between the Trust as the 'data controller' and the supplier as the 'data processor', including any 'sub processors' used in the supplier's supply chain. Before any orders are awarded that will result in additional sharing of personal data a Data Protection Impact Assessment (DPIA) must be completed and approved by the Trust's Data Protection Officer, which should be confirmed by the order requestor in the procurement summary.

Compatibility for IT hardware or software should be checked with a member of the Trust's IT Department before orders are awarded.

Failure to follow this policy would be considered a breach of the code of conduct and will be managed using the disciplinary policy.

4 Tender Procedures

All purchases with a value greater than £100,000 must be put out to formal tender. The following procedures must be followed in such circumstances:

A specification will be prepared, authorised by the Executive committee and sent to at least three suppliers. All major building works that are expected to exceed the UK work contract thresholds require the engagement of professional agents to deal with the handling of specifications and suitability to tender. NB: Procurement processes for new professional agents will fall within the remit of this procurement policy. Legacy contractors will be reviewed by the relevant committee when a need is identified.

1. Where appropriate, the suppliers invited to tender should be drawn from an approved list or from those agreed with the architect. Otherwise, invitations to submit tenders will be advertised in local newspapers and trade journals if appropriate. The invitations to tender will include:
 - (a) an introduction/background to the project;
 - (b) the scope and objectives of the project;
 - (c) any technical requirements;
 - (d) implementation details for the project;
 - (e) the terms and conditions of the tender; and
 - (f) the form and date of response to the academy, or in the case of building works, to the architect or quantity surveyor.
2. All replies should be addressed to the Service Manager (or other named individual) in a plain sealed envelope marked 'Tender' to reach him/her by a specified date. All replies must be kept sealed until that date.
3. All tenders will be opened at the same time and details of the contractor, quotation and any other details recorded at the time of opening.
4. No contractor will be allowed to amend the tender after the time fixed for receipt.
5. The Service Manager (or other named individual) will open a separate correspondence file for each tender which will contain copies of all correspondence or other relevant information.
6. For purchases exceeding £100,000, provided the expenditure has been budgeted for, a decision will be made by the Trust Finance or Operations committee. The decision will need to be ratified by the Board of Directors for purchases that have not been budgeted for or for those greater than £150,000.
7. Where expenditure is not included in the budget or anticipated expenditure exceeds the budget allocation, the decision as to which tender to accept will be taken by the Regional Governing Body, Finance Committee or Operations Committee, in line with their terms of reference and then ratified by the Board of Directors; and
8. The reasons for accepting a particular tender must be documented, especially if it is decided to accept other than the lowest tender. All decisions must be reported to the Board of Directors through the minutes of the Regional Governing Body, Finance Committee or Operations Committee.
9. Tender proposals must be submitted to the relevant approver/s using the Procurement Summary Template (Appendix 3) with all relevant quotes included.

5 Acceptance of tender

The following points will be considered when deciding which tender to accept:

1. The overall price and the individual items or services which make up that price.
2. Whether there are any 'hidden' costs; that is additional costs which the academy will have to incur to obtain a satisfactory product.
3. Whether there is scope for negotiation, while being fair to all tenderers.
4. The qualifications and experience of the supplier, including membership of professional associations.
5. Compliance with the technical requirements laid down by the school.
6. Whether it is possible to obtain certificates of quality.
7. The supplier's own quality control procedure; pre sales demonstrations, after sales service and, for building works, a six-month defects period and insurance guarantees.
8. The financial status of the supplier.
9. References from other establishments.
10. Understanding & compliance with Health & Safety, CDM regulations and Child Protection issues related to working on a school site

In the case of building works, where the tendering process is being carried out by the architect or quantity surveyor, they will be responsible for checking the documents of the lowest tender before making a recommendation to the academy.

Once a tender is accepted an order should be issued immediately to the supplier in the normal way.

The Academies Financial Handbook and delegated financial limits should be considered when applying this policy.

6 Related party transactions

Related party transactions must be monitored and scrutinised by budget holders and committees prior to approval being made. The internal register of interests will be shared with members of staff and committee/board members with authority to approve purchases. All known related parties will also be marked within PSF so that approvers are able to identify them before making approval.

7 Low Level Trusted Supplier Transaction Approval

Low level transactions are subject to the scrutiny of requiring a purchase order, and being through a reliable, trusted, provider.

Suppliers on the below list for approval of invoices, strictly where the value is £200 (NET) or less, are subject to requiring an approved purchase order, and an invoice from the supplier.

Suppliers recognised by this point:

- Amazon

Due to the low value, consistency of the supplier(s) listed above, and Purchase Order being used, there is a limited chance of non-delivery, plus the time savings for all staff throughout the admin process negate the limited risk.

For any invoices which do not have an approved purchase order, or are over the £200 (net) figure, will require full standard approval in line with the Financial Scheme of Delegated Limits or confirmation of receipt (where an item has a valid Purchase Order).

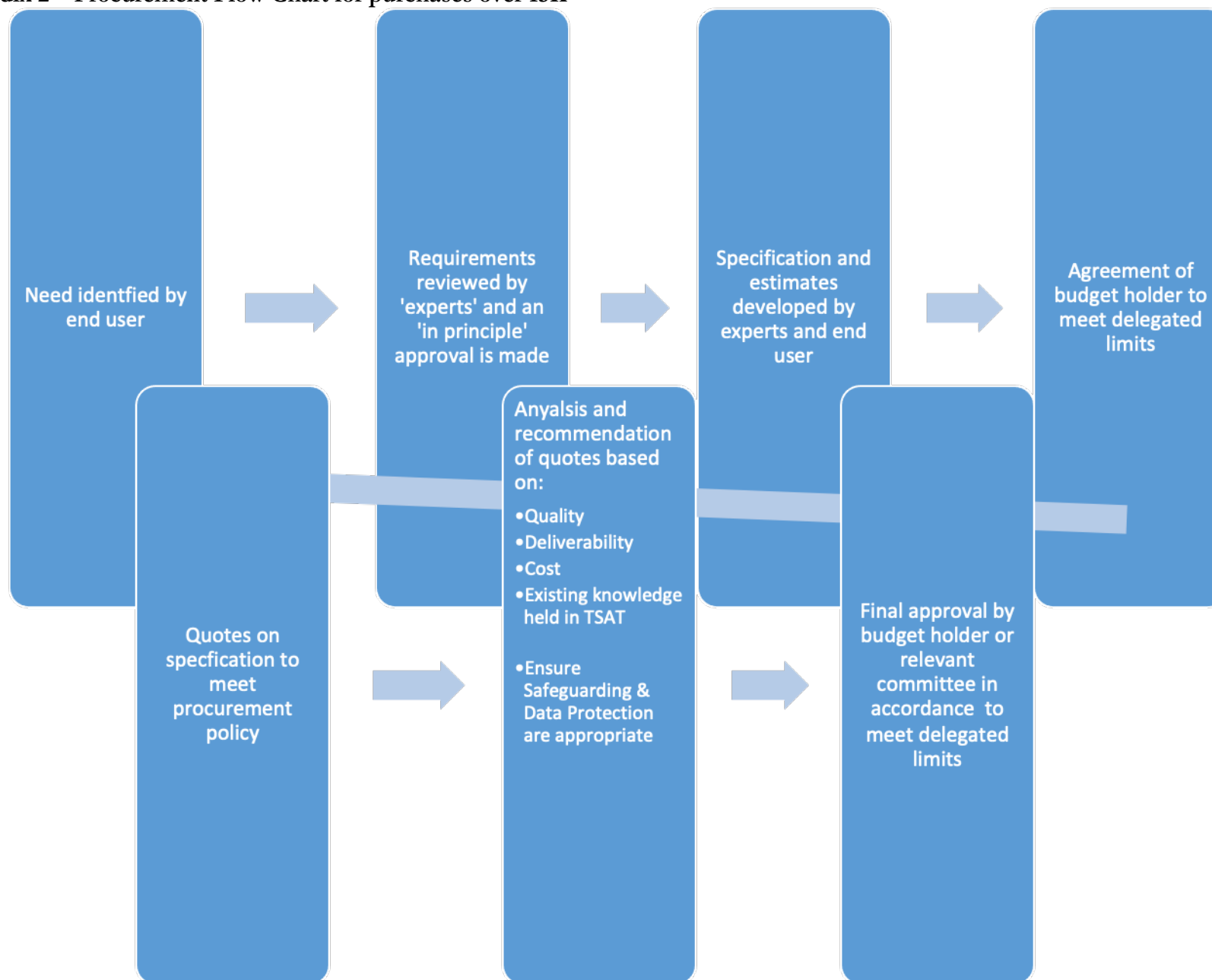
Below are requirements for the documents to be processed without further approval:

- an approved Purchase Order is raised in advance;
- the supplier is included on the approved low-risk supplier list;
- the invoice matches the PO in value and description;
- evidence of receipt is available on request (e.g. delivery confirmation, departmental confirmation, system records).
- Where multiple low-value orders are placed with the same supplier, these will be subject to the usual approval process (i.e. attempts to circumvent the approval system will not be permitted).

Appendix 1 –Financial Scheme of Delegated Limits

Type	Description	Board of Directors	Trust committees	Senior Executive	Executive (Non-Senior)	IT/ Facilities Heads	Head of HR	Head of Service / Head of Business Operations	Central Team Regional Lead (e.g. RFM/FBP)	School Budget Holders
Contracts/SLAs less than 1 year	For any agreement that will last less than 1 year	Unlimited	£150,000	£75,000	£50,000	£20,000	£15,000	£15,000	£5,000	
Contracts/SLAs greater than 1 year	For any agreement that will last more than 1 year (total contract value)	Unlimited	£150,000	£75,000	£50,000	£20,000	£15,000	£15,000	£5,000	
Lease agreements	An agreement with a supplier to provide a premium for equipment to be used by the school	Unlimited	£150,000	£75,000	£50,000					
Individual orders	An individual purchase with one supplier	Unlimited	£150,000	£75,000	£50,000	£20,000	£15,000	£15,000	£5,000	£2,500
Staff expenses	To reimburse staff expenses	Unlimited	£20,000	£15,000	£10,000			£5,000	£500	£100
Capital projects	A cost that will exceed the capital threshold	Unlimited	£200,000	£100,000	£50,000	£20,000				
Sales and Lease of Land	If a sale or lease agreed for use of the schools land or buildings (subject to Secretary of State approval)	Unlimited	£50,000 (limited at 5yrs)	£25,000 (limited at 3yrs)						
Contracted out services	If a contract is agreed that will provide a source of income for the school	Unlimited	£150,000	£75,000	£50,000			£20,000		
Settlement agreements	To agree a settlement payment with staff	Unlimited	£50,000	£25,000			£15,000			

Appendix 2 – Procurement Flow Chart for purchases over 15K



TSAT PROCUREMENT SUMMARY

PROJECT TITLE		ORDER REQUESTOR					
ACADEMY		FUNDING SOURCE					
PROJECT SCOPE/PURPOSE:							
SPECIFICATION/PROPOSAL:							
		<i>Highlight relevant value and quotes required</i>					
PROJECT VALUE	5-15k	15-50k	50-100k	100k-UK limits	>UK Limits		
QUOTES/TENDERS REQ'D	2 (informal)	3 (written)	3 (formal)	4 (tenders)	5 (tenders)		
QUOTES/TENDERS REC'D		<i>Explain if number of quotes/tenders less than required:</i>					
	SUPPLIER			AMOUNT			
1.							
2.							
3.							
4.							
5.							
RECOMMENDATION <i>(based on the core areas of VFM – Quality, Deliverability, Price/ Right Things, Right Way, Right Price):</i> <u>Right Things (Quality):</u> <u>Right Way (Deliverability):</u> <u>Right Price:</u>							
DOES SAFEGUARDING AND/OR SAFER RECRUITMENT NEED TO BE CONSIDERED AND ASSESSED AS PART OF THIS PROJECT?							
DOES THIS PROJECT INVOLVE THE SHARING OR PROCESSING OF PERSONAL DATA? If so ensure a DPIA is completed and liaise with the Data Protection team							
DOES THIS PROJECT INVOLVE A RELATED PARTY TRANSACTION? If 'Yes' then sign off required by Head of Finance						Yes / No	
DOES THIS PROJECT INVOLVE ICT HARDWARE OR SOFTWARE? If 'Yes' please check with the helpdesk for compatibility first and provide call reference number						e.g #2010-1000	
APPROVED BY	Revenue	HT/HoS/HBO <15K	Head of IT/ Facilities <20K	Exec (Non-Senior)<50K	Senior Exec <75K	Trust Comms <150K	Board >150K
APPROVED BY	Capital	n/a	Head of IT/ Facilities <20K	Exec (Non-Senior)<50K	Senior Exec <100K	Trust Comms <200K	Board >200K
APPROVER NAME				APPROVER SIGNATURE			
APPROVER POSITION				DATE			