



Little Way Catholic  
Educational Trust

# Competitive Tendering Policy

|              |       |       |          |
|--------------|-------|-------|----------|
| Approved by: | Board | Date: | 05.02.25 |
|--------------|-------|-------|----------|

|             |       |
|-------------|-------|
| Adopted by: | Date: |
|-------------|-------|

|                   |     |
|-------------------|-----|
| Last reviewed on: | N/A |
|-------------------|-----|

|                     |             |
|---------------------|-------------|
| Next review due by: | Spring 2028 |
|---------------------|-------------|

## Table of Contents

|                                                      |   |
|------------------------------------------------------|---|
| 1: AIMS AND SCOPE                                    | 3 |
| 2: LEGISLATION AND GUIDANCE                          | 3 |
| 3: ROLES AND RESPONSIBILITIES                        | 3 |
| 4: PURCHASE THRESHOLDS                               | 4 |
| 5: APPROVAL AUTHORITY                                | 4 |
| 6: FRAMEWORK AGREEMENTS                              | 4 |
| 7: VALUING CONTRACTS                                 | 5 |
| 8: EVALUATING TENDERS                                | 5 |
| 9: TENDERING PROCESS: LOW AND MEDIUM-VALUE CONTRACTS | 5 |
| 10: TENDERING PROCESS: HIGH-VALUE CONTRACTS          | 5 |
| 11: RECORD KEEPING                                   | 6 |
| 12: MONITORING ARRANGEMENTS                          | 6 |
| 13: LINKS WITH OTHER POLICIES                        | 6 |

## 1. Aims and Scope

This Competitive Tendering Policy is designed to ensure that all procurement activities undertaken by the Trust are conducted with integrity, fairness, and transparency, and to secure the best value for money. The Trust is committed to managing conflicts of interest and ensuring that procurement decisions are made impartially.

This policy applies to all purchasing and contract-awarding activities, regardless of value, and covers all goods, services, and works.

It aims to promote a competitive marketplace, ensure compliance with legal obligations, and protect public funds by preventing fraud, waste, and abuse. By adhering to this policy, the Trust will uphold the principles of value for money, competition, and accountability in all procurement processes.

## 2. Legislation and Guidance

All procurement activities will be carried out in line with the following relevant legislation and guidelines:

- Public Contracts Regulations 2015 (PCR) which implement EU procurement rules now retained post-Brexit.
- Procurement Policy Notes (PPN) issued by the Cabinet Office.
- The Bribery Act 2010, to prevent bribery and corruption in procurement.
- The Public Sector Equality Duty (2010) ensures non-discrimination, equal treatment, and fairness throughout the procurement process.
- Department for Education (DfE) guidance on buying procedures and procurement law

## 3. Roles and Responsibilities

The roles and responsibilities of those involved in the tendering process are as follows:

- Chief Finance Officer (CFO): Oversees procurement processes, ensures compliance with this policy, and provides expert advice.
- Budget Holder: Manages the tendering process for specific contracts and ensures adherence to the policy - This will likely be the Headteacher.
- Procurement Team: Provides administrative support, helps manage tendering processes, and ensures legal and procedural compliance. This will be created for each procurement process
- Evaluation Panel: Assesses tenders based on objective criteria and makes recommendations regarding supplier selection.

The procurement team and evaluation panel may include members of the Finance Audit & Risk Committee and, if necessary, the Trust Board, especially for high-value contracts or when significant strategic decisions are involved.

All parties involved must manage conflicts of interest and act impartially. If any conflict arises, the individual concerned must disclose it and may be excluded from the decision-making process.

## 4. Purchase Thresholds

The following purchase thresholds apply:

- Low-Value Purchases (up to £10,000): No formal tendering required, but a competitive process (e.g., obtaining quotes) should be followed.
  - For orders up to £5,000 there is no absolute requirement to obtain multiple quotes.
  - For orders between £5,000 and £10,000 – two written quotes must be obtained.
- Medium-Value Purchases (£10,000 to £40,000):
  - Orders between £10,000 and £20,000 – two written quotes must be obtained.
  - Orders between £20,000 and £40,000 – three written quotes must be obtained.
- High-Value Purchases (above £40,000):
  - A full competitive tendering process should be followed, with clear documentation and evaluation processes and a minimum of three companies quoting.

For any tender process, the Trust may consult with a procurement specialist to ensure the process is carried out in compliance with all regulations and to seek legal advice when necessary.

At this stage, it is not anticipated that any Trust procurement will exceed the thresholds set by the Public Contracts Regulations (currently £214,904), nor approach the light-touch threshold of £663,540.

## 5. Approval Authority

The following approval process applies:

- Low-Value Purchases (up to £10,000):
  - Headteacher / Budget Holder / Finance Manager
- Medium-Value Purchases (£10,000 to £40,000):
  - Orders between £10,000 and £20,000: Headteacher / Budget Holder / Chief Finance Officer
  - Orders between £20,000 and £40,000 Headteacher / Budget Holder / Chief Finance Office / Chief Executive Officer
- High-Value Purchases (above £40,000):
  - Orders between £40,000 and £50,000 Headteacher / Budget Holder / Chief Finance Office / Chief Executive Officer
  - Orders over £50,000 Headteacher / Budget Holder / Chief Finance Office / Chief Executive Officer and Trust Board Director

## 6. Framework Agreements

The Trust encourages the use of framework agreements, such as those available via the DfE Buying for Schools Hub or Church Marketplace, to simplify procurement processes and reduce costs. These agreements often have favourable terms and have already undergone a competitive tendering process. When possible, the Trust will either select the best value supplier from an approved list or run a mini-competition between suppliers.

Framework agreements provide the Trust with access to a wide range of products and services and enable greater flexibility and cost efficiency.

## 7. Valuing Contracts

The value of a contract should reflect the total expenditure over its full term, including any extensions or renewals. For contracts with multiple payments or potential extensions, the full potential value should be considered to determine the appropriate tendering process.

## 8. Evaluating Tenders

The Trust will evaluate all tenders based on a clear set of criteria, including, but not limited to:

- Price (weighted appropriately)
- Quality and specifications (prior performance, where applicable)
- Delivery timelines
- Risk assessments
- After-sales service and support
- Supplier reputation

In addition to assessing the specific submission, previous performance will be considered to determine the most economically advantageous tender.

For low-value and medium-value tenders, a clear specification will be created and shared with suppliers. Suppliers will be asked to submit quotes or tenders, and their responses will be scored on a scale of 1 to 5, with 5 being the best/most favourable score.

When contacting suppliers, the specification, tender deadlines, and instructions on how to ask for clarification will be clearly communicated.

## 9. Tendering Procedure: Low and Medium-Value Purchases

For low-value and medium-value purchases, the following steps should be followed:

- Create a specification: This should clearly outline the requirements, objectives, and expectations of the contract.
- Compare suppliers: Research and identify suitable suppliers who can meet the specifications.
- Access quotes: Obtain quotes from a minimum of two suppliers for medium-value purchases.
- Scoring: Suppliers' responses will be evaluated on a scale of 1 to 5, based on price, quality, and suitability for the contract.
- Clarifications: Suppliers will be provided with clear instructions on how to submit queries regarding the specification and the tender process.

## 10. Tendering Procedure: High-Value Purchases

For high-value purchases, the following steps must be followed:

- Create a specification: (as outlined in section 9).
- Assess the market: Research the market to understand available suppliers and determine the best way to advertise the contract.
- Check thresholds: Ensure the procurement falls below the PCR thresholds for full compliance.
- Develop a contract: A contract will include terms and conditions, service levels, contract management plans, and an exit strategy.

- Reduce the number of bids: This may involve using a pre-qualification questionnaire or an expression of interest process.
- Assessment criteria: Develop clear criteria to evaluate the tenders based on the most economically advantageous combination of price and quality.
- Create a timeline: Include key dates for the clarification period, submission deadlines, and contract award.
- Prepare an invitation to tender: Include all necessary documentation, such as the specification, pricing schedule, terms and conditions, evaluation criteria, and a timeline.
- Advertise the contract: Contracts over PCR thresholds must be advertised in the appropriate services, such as Contracts Finder or Find a Tender.
- Run the tender process: Including clarifications, evaluations, and ensuring suppliers meet all requirements.
- Evaluate tender responses: Two or more evaluators will independently score the responses.
- Notify bidders: Both successful and unsuccessful bidders will be notified of the outcome.
- Challenges from bidders: Any challenges will be handled with transparency, ensuring the process was fair, and legal advice will be sought if necessary.
- Finalize the contract: Once no challenges are made, finalize the contract and publish the award details.
- Abandoning the tender process: If the process is halted, bidders will be notified without liability.

## 11. Record Keeping

All records related to the tendering process, including invitations to tender, tender submissions, evaluations, and decisions, will be maintained in line with the Trust's data retention policies and procedures.

## 12. Monitoring Arrangements

The procurement process will be regularly monitored, and the Trust will stay up-to-date with any changes in national procurement law. The policy will be updated to reflect any changes once new procurement legislation receives Royal Assent and is implemented.

Internal audits and reviews will assess the effectiveness of the tendering process.

## 13. Links with Other Policies

This Competitive Tendering Policy is linked to and aligns with other Trust policies, including:

- Anti-Fraud and Corruption Policy: Ensures procurement processes are free from fraud and corruption.
- Conflict of Interest Policy: Manages potential conflicts of interest throughout the procurement process.
- Finance Policy: Ensures procurement is consistent with the Trust's financial principles and procedures.
- Investment Policy: Ensures that procurement decisions align with the Trust's investment strategies and objectives.
- Risk Management Framework: Manages the risks associated with the procurement process.