

The Frances Bardsley Academy for Girls

Tendering Policy



This document was accepted and ratified by the Finance, Facilities and Personnel Committee of the Governing Body

on: March 2016

Review date: March 2017

Person responsible: Finance Officer

Procedures

All purchases with a value greater than £50,000 must be put out to formal tender. The following procedures must be followed in such circumstances:

1. A specification will be prepared by the budget holder, authorised by the chair of the relevant committee and Finance Officer and sent to at least three suppliers. It is anticipated that for any major building works of a value greater than £50,000 the services of an architect may be engaged to deal with the handling of specifications and suitability to tender.
2. In the case of building works, the suppliers invited to tender should be drawn from the approved list agreed with the architect. These suppliers stand to be chosen with regard to The Register of Pecuniary Interests to ensure no personal gain, and suitable site references will be sought. 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.
3. All replies, if to the academy, should be addressed to the Finance Officer in a plain sealed envelope marked 'Tender' to reach him/her by a specified date. All replies must be kept sealed until that date and passed to the chair of the relevant committee. The tenders will be opened by an independent adjudicator.
4. 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,
5. No contractor will be allowed to amend the tender after the time fixed for receipt.
6. The Finance Officer will open a separate correspondence file for each tender which will contain copies of all correspondence or other relevant information.
7. For contracts up to £75,000 (provided the expenditure is included in the budget) the decision as to which tender to accept will be recommended by the Finance Officer, and taken by the Head teacher, in accordance with the schools Scheme of Delegation.
8. For contracts between £75,000 and £150,000, the decision as to which tender to accept will be authorised by the Finance, Premises & Personnel Committee, in accordance with the schools Scheme of Delegation.
9. Contracts above £150,000 must be accepted by the Full Governing Body, in accordance with the schools Scheme of Delegation.
10. 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 full governing body.

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 academy.
6. Whether it is possible to obtain certificates of quantity.
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 academies.
10. Understanding & compliance with Health & safety, CDM regulations and Child Protection issues related to working on a academy 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.