

Purchasing, Procurement and Competitive Tendering Policy

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History of policy changes and review

Policy	Briarwood School Procurement and Competitive Tendering Policy	
Author	Finance & Business Development Manager	
Approved by	Operations Committee	
Review frequency	Annual	
Next review date	December 2026	
HISTORY OF POLICY CHANGES / REVIEWS		
Date	Change	Details
July 2021	New policy	
March 2023	Procurement threshold values Use of three quotes Use of frameworks Use of waiver Best value statement & value for money definitions	Edited in line with the new January 2022 Public Contracts Regulations (PCR) procurement thresholds and revised Bristol City Council Financial Regulations for Schools with Delegated Budgets & and Scheme for Financing Schools, both 2022
September 2024	Updates to procurement thresholds Governors' authorisation Roles and responsibilities - purchasing authorisation limits Contract management Appendices 1 & 2 added	In line with BCC procurement rules 2024 and Public Contracts Regulations 2015 updates In addition to termly meetings, governors can also authorise procurements through online portal GovernorHub Contract renewals & extensions can be authorised as part of Original budget process New paragraph added Detailed process information moved to appendices
March 2025	Reference to updated declaration of interests policy	
August 2025	Updates in line with the requirements of the Procurement Act 2023	Additional aims & updated statutes and associated policies. New training and learning responsibilities. Updates to High Value and Very High Value processes with Appendix 2 removed.
December 2025	Updated upper threshold value Added link to guidance in References	Updated in line with PPN 023: 2026 Threshold Amounts, effective 1 January 2026

Section 1

Policy

Introduction

Briarwood School is responsible for spending public funds wisely and with care, optimising the use of their resources to invest in teaching and learning.

As with all schools, Briarwood has a duty to ensure purchasing processes are fair, legal and open, securing the best possible value for money. Clear procurement processes help to make sure that time and resources are used effectively and efficiently.

Best Value statement

A basic tenet of Briarwood's commitment to Best Value is to procure goods and services competitively using open and fair processes that address both price and quality considerations to best meet the needs of Briarwood School and its students. The Governors of Briarwood School are committed to the 4C principles of Best Value: challenge, compare, consult and compete.

Aims

This policy aims to ensure that Briarwood School's procurement processes support and promote:

- principles of best value for money, including assessments around benchmarking of expenditure, quality, sustainability and whole-of-project costs
- principles of integrity and treating all potential suppliers in the same way, avoiding putting suppliers at an advantage or disadvantage
- governor's and school staff's knowledge around, and ability to challenge, how and why goods and services are procured to meet the aims of Briarwood School and our School Improvement Plan
- fair and transparent competition through quotations, tenders and use of appropriate frameworks, to ensure that goods and services are secured in the most economic, efficient and effective way
- compliance with:
 - Procurement Act 2023 and Procurement Regulations 2024
 - The Public Contracts Regulations (PCR) 2015
 - Equality Act 2010
 - Data Protection Act 2018
 - The UK General Data Protection Regulation (UK GDPR)
 - Bristol City Council's Scheme for Financing Schools and Financial Regulations for Schools with Delegated Budgets 2025
 - Bristol City Council's Procurement Rules 2024
 - Schools Financial Value Standard
 - DfE buying procedures and procurement law for schools
 - Briarwood School's Finance Policy, Anti-Fraud and Corruption Policy and Declaration of Interests policy
- development of best practice in purchasing, including areas such as sustainability, social value and inclusion, and health and safety

Purpose

This Purchasing, Procurement and Competitive Tendering Policy will outline:

- Roles and responsibilities around procurement
- Financial value thresholds for different types of procurement processes
- The requirements of different procurement processes

This policy does not apply where Briarwood School is using contracts arranged by Bristol City Council or Trading with Schools (TWS). However, these types of contracts will remain subject to review and, if necessary, a new school-led procurement process, to ensure value for money standards are met.

Roles and responsibilities - training and learning

The Head of Operations and governing board will ensure that all relevant staff undertake appropriate procurement training, provided by the government, for the Procurement Act 2023 which is suited to their role.

Roles and responsibilities - purchasing authorisation

The Executive Head has responsibility for the overall supervision of the financial affairs of the school, delegating specific responsibilities to members of staff as appropriate to their job descriptions, while ensuring adequate segregation of financial duties. These staff members may include, but are not limited to, the Head of Operations, the Head of Provision, the Head of Inclusion, Head of Education, Head of Learning & Development and the Heads of Schools.

All procurement requests will be assessed by the relevant budget holder and quality checked to ensure the goods or services are needed, are affordable, that key stakeholders have been identified and the procurement request is accompanied by a clear written specification of requirements. Any implementation, or other significant risks, should be flagged and added to the school's risk register for management and review, as needed.

Competitive procurement value thresholds fall under Briarwood School's purchasing authorisation limits, as detailed in the Finance Policy. The value for a proposed Contract must be a genuine pre-estimate and must be based on the total aggregated value over the life of the Contract, including any provision for extension(s).

If expenditure is agreed in the annual budget, including the associated contract review, or School Improvement Plan (as previously agreed by Full Governors and Executive Headteacher), then no further authorisation is required. This includes contract extensions and renewals for high performing contracts under £25k, which are agreed as part of the Original budget setting and approval process.

If expenditure exceeds agreed budget or is not specified in the budget, authorisation is required as follows:

- **Purchasing up to the value of £5,000** can be authorised by the relevant budget holder with written cost/price information being attached to the purchase requisition order form.

- **Purchasing from £5,001 up to the value of £25,000** can be authorised by the Executive Headteacher and Operations Committee, either at the termly meetings or via GovernorHub online portal. Written evidence of three quotations and service specification must be attached, unless a waiver is exercised.
- **Purchasing to a value higher than £25,001** should be referred by the Executive Headteacher and Operations Committee to the Full Governing Body for approval; following adherence to the high value procurement process (see Section 2).

Any potential conflicts of interest, including business interests, must be declared by Governors and school staff at the earliest stage of discussions around procurement and as part of an annual declaration process (please see the Declarations of Interest policy). A register of Business Interests is maintained by Briarwood School and reviewed at least annually.

Governing bodies entering into contracts do so on behalf of, and in the name of, Bristol City Council. Briarwood School and its Governors are responsible for the proper management of such contracts and for the authorisation of payments.

Purchase orders are needed for all goods and services, regardless of value.

Framework agreements

Wherever possible, Briarwood School will make use of one of the many DfE-approved Buying for Schools frameworks and or Bristol City Council procurement team-approved frameworks.

The Head of Operations and / or the Finance and Business Development Manager will make an assessment around whether to use a framework agreement and which framework to use, with approval to proceed based on the purchasing authorisation limits above.

Procuring goods or services through a framework agreement of pre-approved suppliers will generally be quicker, easier and more robust than running individual procurement processes because:

- Suppliers have already completed a full competitive tender process assessing both quality and price successfully
- Suppliers have been through a government-approved due diligence process and have been checked for compliance with statute and relevant regulations
- Framework agreements usually include transparent pre-set pricing structures and contractual standards, terms and conditions
- Specialist procurement support is often provided as part of the process
- Processes are clearly laid out for the school to follow
- Advertising of opportunities will be compliant and in line with the latest legislation
- Supplier clarification questions and school responses are handled centrally and transparently

The reasons for the choice of framework, and for the choice of supplier, will be clearly recorded as part of the procurement decision and documentation.

Competitive procurement exceptions & waiver

The governing body has the power to waive the usual requirements for competitive procurement in the circumstances listed below, with the decision formally communicated by the Chair of Governors via GovernorHub online portal or minuted at the Operations Committee meeting:

- The contract or purchase is urgently required and delay would cause loss, injury or damage
- The contract, purchase or expenditure is for such a specialist purpose that competitive procurement would provide no useful benefit and or the supplier market is very small
- The contract payment is fixed under statutory authority, the item is patented or is only available from a single source or supplier

Please note: waivers cannot be applied in High Value or Very High Value procurement processes.

Section 2

Procurement

Processes

Procurement processes

The Finance & Business Development Manager and Finance & Business Development Assistant will lead on and support with any competitive tendering processes.

Depending on the procurement process' value, quotes, proposals or tenders will be scored by the future contract owner and or budget holder, Finance & Business Development Manager, Head of Operations and the Executive Head with further review by Governors through the Operations Committee at termly meetings or through GovernorHub online portal.

Selection of the winning supplier, for any procurement process, will generally be awarded to the supplier that meets all of the procurement's specifications on the most economically advantageous basis for Briarwood School. Quality is a key consideration and constitutes an essential element of Value for Money. If the lowest price is not selected, the reasoning and basis for the procurement decision must be recorded and approved in the minutes of the Governing Body.

Every invitation to quote must state that the Governing Body is not obliged to accept the lowest price.

Briarwood School utilises four procurement processes, each based on the estimated value of the goods or services being purchased:

1. Low Value Process: goods and services valued up to £5,000 – one written quotation required

A minimum of one written quote must be obtained, wherever possible from a local / SME (Small and medium-sized enterprise) supplier, to be attached to the purchase order and authorised by the budget holder.

2. Medium Value Process: goods and services valued between £5,001-£25,000 - minimum of three quotes sought

A minimum of three written quotations should be sought, in response to a written specification, to include local / SME suppliers wherever possible. Quotations may be sought via a DfE or BCC approved procurement framework or directly from suppliers. Where quotations are sought directly from suppliers the process detailed in Appendix 1 should be followed (Appendix 1 - Seeking Quotations Directly from Suppliers).

Medium value procurement to be authorised by the Operations Committee.

3. High Value Process: goods and services valued between £25,001 and Public Contracts Regulations (PCR) procurement threshold of £207,720 including VAT

The PCR threshold of £207,720 includes VAT. The indicative value of the threshold, excluding 20% VAT, is £173,100.

Briarwood School will undertake high-value procurement processes via a DfE, government or Bristol City Council approved framework wherever possible.

The school will procure for high-value purchases without a framework only in rare circumstances. Where this does happen, we will consult Bristol City Council’s Trading with Schools (TwS) Contract Management and Procurement team and or the Buying for Schools service for support and advice. The school may procure the services of external professionals to support High Value and Very High Value Processes. Procurements will be advertised on the Find a Tender portal, as needed, and the school will ensure full compliance with the Procurement Act 2023 and 2024 regulations.

High value procurement to be referred by the Operations Committee to the Full Governing Body for authorisation.

4. Very High Value Process: for goods and services valued over the current Public Contracts Regulations (PCR) procurement threshold of £207,720 including VAT

The PCR threshold of £207,720 includes VAT. The indicative value of the threshold, excluding 20% VAT, is £173,100.

If it is estimated that the cost of a contract is above the PCR threshold for procurement spending, Briarwood School will follow and seek advice from the DfE Buying for Schools service and Bristol City Council regarding appropriate frameworks that can be used for undertaking a formal, compliant tender procedure.

Where there is no framework available and, as with procurements of a High Value, the school may procure the services of external professionals to support Very High Value Processes. Procurements will be advertised on the Find a Tender portal, as needed, and the school will ensure full compliance with the Procurement Act 2023 and 2024 regulations.

Very high value procurement to be referred by the Operations Committee to the Full Governing Body for authorisation.

Assessment of price, quality and other factors

Ahead of a procurement decision being made all supplier proposals, quotes or tenders will be assessed on the basis of:

- price including impact of maintenance, delivery and running costs
- quality of service and products
- ability or capacity to meet the procurement specification
- social, economic and environmental impacts, in-line with the Council's Social Value policy and One City Climate & Ecological Emergency strategies
- any other added value benefitting pupils and the school

The weighting of each of the factors above may be adjusted based on the competitiveness of the market, the importance of specific quality criteria (such as levels of expertise, delivery time, etc) and the scale of the procurement.

Recording a procurement decision

Once a procurement process is complete and a decision to procure has been made, a Procurement Compliance Record should be completed detailing the requirements and type of procurement process, a comparative summary of supplier offers and the contract award decision outcome and rationale. This record is drafted by the Finance & Business Development Manager or Finance & Business Development Assistant and reviewed by the Head of Operations, Executive Headteacher and Governors, as needed.

Where a minimum of three quotes has not been obtained, the context for this should be clearly recorded. This may be due to the use of a waiver, capacity and or the availability of relevant suppliers or other specific circumstances.

Contract management

Once the contract has been awarded, the school will nominate a named contract owner to review and monitor the contract, its progress and management. The contract owner will be responsible for ensuring suppliers meet their contractual obligations including high quality and timely delivery of the goods and services procured and meeting any reporting requirements.

All contracts must be signed by the Executive Headteacher and include clear information around the goods and services procured, pricing, termination notice periods, quality requirements (e.g. a Service Level Agreement, Key Performance Indicators, project plan and timeline or similar) and reporting obligations.

New suppliers, services and assets

All suppliers will need to confirm their compliance with:

- IR35 regulations
- Health & Safety best practice and statutory responsibilities
- Children's Code requirements, where applicable

All relevant services and assets will need to be logged on two systems:

- RM Finance System supplier record
- Parago Asset Management system registers – licenses, assets, contracts, compliance checks

References, appendices and links

Appendix 1 - Seeking Quotations Directly from Suppliers

When seeking quotations directly from suppliers, the school should use the process outlined below:

a. Create a specification – a specification document will set out what suppliers need to understand what we are looking to buy, including the quality, quantity and delivery date

b. Review the market – a comparison of different suppliers, including their reputation, will help Briarwood develop a shortlist of at least 3 suppliers we want to approach for a written quote

c. Contact suppliers for quotes, sending them:

- The specification
- Deadlines for quotes and when decisions will be made
- Instructions for how to ask clarification questions about the specification

In order to avoid legal challenges:

- No quotes will be opened before the deadline
- No late quotes will be opened
- All quotes will be treated fairly and equally
- We will keep confidential, secure, auditable records

d. Assess quotes – award criteria will be developed to assess suppliers' quotes and shared with each supplier. Criteria will include areas for scoring that cover both price and quality, including:

- How well the supplier meets our specification
- The whole-life cost of the contract, which may include the sale price of the goods, works or services, delivery charges, running costs, disposal costs, price changes over the life of the contract
- Value for money which is an assessment based on quality, price and the overall offer, which may include benefits such as ease of use, fast delivery, adaptability, reputation and reliability of the supplier among other attributes
- Any other areas essential to meet the school's specific needs, e.g. accessibility, safety, durability
- Social value, sustainability and environmental considerations, any other added value

Each aspect of the criteria will be given a range of scores will be scored on a scale of 1 to 5, with 5 being the highest score, in addition to a weighting where an assigned figure is used to multiply the score, depending on how important the criteria is. Both quality and process will be assessed and weighted in line with school priorities.

The Head of Operations and Finance and Business Development Manager will each score quotes and discuss where and why scores have differed before reaching an agreed score. We will buy from the highest scoring supplier. Records of how the quotes are evaluated will be kept.

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All medium value tender processes will be approved by the Operations Committee unless a waiver is agreed.

e. Commission supplier - when the best value quote is identified, the Finance and Business Development Assistant will send the winning supplier a purchase order, which includes details of the:

- Goods, works or services we are purchasing
- Price
- Delivery address
- Delivery deadline and any other important dates
- Payment schedule

Links with other policies

- Finance Policy
- Declarations of Interest policy
- Anti-Fraud and Corruption policy

Links with other Briarwood School documents

- Briarwood School Roles & Responsibilities
- Declaration of Interests Register
- Procurement Compliance & Governance Record
- Schools Financial Value Standard (Briarwood's is updated annually)

References

Bristol City Council:

- Financial Regulations for Schools with Delegated Budgets, 2025
- Scheme for Financing Schools, effective 1st April 2024
- Bristol City Council's Procurement Rules 2024
- Social Value Policy, February 2021
- One City Ecological Emergency Strategy, September 2020

GOV.UK Department for Education: Buying for schools – includes access to specialist professionals and a range of frameworks:

<https://www.gov.uk/guidance/buying-for-schools>

GOV.UK Find information on UK public procurements and contracts – includes legislation, access to Find a Tender and general support:

<https://www.find-tender.service.gov.uk/Search>

GOV.UK Cabinet Office: Guidance – Procurement Policy Note (PPN), PPN 023: 2026 Threshold Amounts:

https://www.gov.uk/government/publications/ppn-023-2026-threshold-amounts/ppn-023-2026-threshold-amounts-html?mc_cid=1950a5ea1d&mc_eid=33d704d1c6#annex-a---summary-of-threshold-amounts-from-1-january-2026