

Procurement Policy and Guidance

Introduction

The essence of good financial control in purchasing and contracting is twofold. Firstly, to ensure that value for money is obtained and secondly to minimise the opportunity for fraud.

New procurement regulations, [Procurement Act 2023](#) (the Act), came into force 24th February 2025, it is therefore key for education establishments to:

1. **Understand the new procurement rules:** school buyers should familiarise themselves with the new procurement rules and guidelines outlined in the Act. This includes the revised tendering processes, evaluation criteria, and contract management practices.
2. **Take a strategic approach:** the Act encourages a more strategic approach to procurement, moving beyond just compliance to prioritise value for money and long-term outcomes. School buyers are encouraged to develop clear procurement strategies aligned with school and Trust objectives and consider social value factors.
3. **Engage with suppliers:** effective communication and collaboration with suppliers will be crucial under the new Act. School buyers should foster open dialogue, provide clear procurement information, and encourage feedback from potential suppliers. [Get help buying for schools](#) can advise on how best to do this.

How to successfully make purchases

It is fundamental that competitive prices/quotations/tenders are obtained on a like for like basis, whether the invitation is for goods or services. Each school/Trust should have formal guidance on how to procure goods and services.

NOTE: Maintained schools are required to follow Worcestershire County Council's Scheme for Financing Schools Policy¹.

Check your school's procurement rules to see what they define as low to high value. The Department for Education (DfE) considers:

- low is under £10,000;
- medium is £10,000 to £40,000; and
- high is over £40,000.

¹ [Worcestershire Schools Forum | Worcestershire County Council](#)

Tendering and Quotation Procedures

Once a decision has been made on what process to follow for each limit then a decision can be made on the route to market, for example:

For the supply of goods or services:

1. Below £10,000 a minimum of two quotations should be obtained. Quotations may be sought verbally but must be confirmed by suppliers in writing (email is acceptable). Catalogue prices may be used.
2. More than £10,001 and less than £50,000. At least three written quotations (email is acceptable) must be obtained based on a specification that succinctly describes the requirement but is not geared to a particular product or service offering. All quotations must be retained² and signed off by the headteacher. and agreed with an appropriate Governor and recorded.
3. More than £50,000, you must run your own buying process, inviting suppliers to submit bids if:
 - You cannot get what you need through a framework agreement.
 - you are buying high-value goods and services.
 - Evidence of appropriate Governor agreement and recorded within the minutes of the meeting.
4. More than £214,904 for goods and services and £5,372,609 for works (current UK threshold levels) run a compliant buying process, advertise the opportunity on the Central Digital Platform and make invitation to tender documents available electronically.
 - appropriate Governor agreement and recorded within the minutes of the meeting.

Prior to making a purchase it is essential to undertake research and review options available. This could include but is not limited to:

- Assessing the market
- Writing a business case
- Detailing who should be involved
- Getting expert help where required
- Estimating the whole-life cost of the contract and classifying the expenditure correctly
- see if you can procure what you need using a DfE recommended framework tool or another framework agreement ([Benefits of using a framework – Find a DfE approved framework for your school – GOV.UK \(find-dfe-approved-framework.service.gov.uk\)](#))

² Unsuccessful tenders/quotes must be retained for a minimum of one year following completion of the contract. Successful tenders/quotes and supporting documentation showing the decision-making process are retained for six years following completion of the contract.

- Writing a specification, when obtaining quotations/tenders it is key to do this against a carefully drawn up specification. Specifications must be prepared by persons properly qualified and experienced to do so
- Assessing if there are any conflicts of interest

For above threshold goods, services and works schools must:

- advertise a contract notice using the Central Digital Platform: [Find a Tender](#)
- make invitation to tender and all other documents available electronically from the time that the contract notice is published
- assess all the bids fairly, using the same process
- choose the supplier that offers best value
- award the contract to the highest scoring bid supplier
- Complete the relevant transparency notices

Emergency Works

Competition may be waived where Contractors need to be engaged, or materials purchased to conduct immediate remedial works in an emergency. Any action taken must be reported to the Governing body at the earliest opportunity. This may include works that are required to keep the school open and safe.

Contractors Own Conditions

In cases where a Contract is let using the Contractor's own conditions, typically accepting a quotation, the Responsible Officer (Headteacher or Governing body) MUST satisfy him/herself that the Conditions are acceptable and do not disfavor the school.

Payment

Payment should be made when the work or supply is satisfactorily complete.

Contractors usually make an "interim claim". It is, however, the Contract Administrator's responsibility to value the work. Interim certificates, which facilitate payments during construction, must be issued by the Contract Administrator (CA) in accordance with the specific terms and conditions outlined in the construction contract

In all cases it is not advisable to make payments in advance.

Records

All records should be kept for the appropriate retention period and will need to be made available when requested which will include but not be limited to appropriate officers of the Local Authority or their agents, internal audit, external audit, property services, procurement and finance.

To minimise the opportunity for fraud and to protect the interests of staff it is fundamental to separate the functions of ordering and receipt/authorisation of payment.

Useful Guidance and support available:

- [Buying for schools: how to buy what you need - Get training on the Procurement Act 2023 - Guidance - GOV.UK](#)
- [Get help buying for schools - a free procurement service for schools and multi-academy trusts - Get help buying for schools](#)
- [Buying for schools: how to buy what you need - Route 5: run a process compliant with the Procurement Act 2023 for high value purchases - Guidance - GOV.UK](#)
- [Buying procedures and procurement law for schools – Buying things that are over the procurement threshold – Guidance – GOV.UK \(www.gov.uk\)](#)
- [Request help and support for your procurement](#)

Please note that this guidance document has been prepared with the aim of providing key information only and does not constitute legal or procurement advice in relation to any particular situation. We would recommend seeking such advice as required.