



PROCUREMENT POLICY

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Policy Owner	Head of Procurement and Contracts
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Our Core Values

Inclusivity.

Reach South is for all children. We recognise that some children will face greater barriers to their learning and development than others. This may be due to any number of challenges, including cultural, social, domestic, physical or cognitive. We are committed to helping all children, particularly the most vulnerable, to overcome these so that they can grow and thrive to be well-rounded, healthy, educated citizens.

Promoting social mobility.

This is a fundamental driver for Reach South. Although we recognise that each school's context and history informs our approach, this is never an excuse for accepting mediocrity or poor performance. An inclusive approach requires an explicit commitment to improving social mobility for all children. To do this, we insist on:

- High standards of educational achievement;
- High standards of social skills and interpersonal skills;
- High standards of communication skills;
- High standards of critical thinking, problem-solving and creativity; and
- Understanding of society, economy, environment and an appreciation of contribution and participation.

Serving our local communities.

Children's education cannot be isolated from their social context and, in particular, their family and peer environment. To raise a child's aspirations beyond their expectations, we must also raise the aspiration of their families and the wider community. Community engagement is not an additional activity that successful schools do; it is fundamental to how they work. Beyond that though, we embrace the fact that the school exists to serve its community; it belongs to the community. Each of our academies will ensure that the curriculum reflects the needs and uniqueness of its community.

Believing in the potential of our young people.

Aspiration is a precursor to self-improvement; it is not sufficient in itself, but limited aspiration will limit achievement. It is our duty to believe in the potential of all of our children and to make that belief infectious. We need the community to believe in their children, and we need the children to believe in themselves. Aspiration itself becomes a driver and a motivator for educational achievement and personal success.

Preparing tomorrow's adults to contribute to social, economic, environmental and cultural sustainable development.

We educate children to improve their own life chances and opportunities, but we also educate them as trusted members of a community and a global society. Through education, we want to make a contribution to securing a society capable of developing, evolving, improving and being sustainable.

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1. INTRODUCTION

Purpose

The purpose of this Procurement Policy is to provide a comprehensive framework for the procurement activities of Reach South Multi-Academy Trust (the Trust). This policy aims to ensure that all procurement activities are conducted efficiently, effectively, and in compliance with the Procurement Act 2023 and other relevant regulations. The policy sets out clear guidelines for the procurement process, ethical standards, financial accountability, and transparency, ensuring the Trust achieves the best value for money while fostering sustainability and social responsibility.

Scope

This policy applies to all procurement activities undertaken by the Trust, including purchasing of goods, services, works, and consultancy. It encompasses the entire procurement lifecycle, from planning and market research through to contract award, management, and performance evaluation. The policy extends to all staff members involved in procurement, whether directly or indirectly, and governs all interactions with external suppliers and contractors.

Objectives

- To ensure value for money in all procurement processes.
- To maintain transparency and accountability in procurement decisions.
- To comply with the Procurement Act 2023 and other applicable laws.
- To promote sustainability, innovation, and social value in procurement decisions.
- To ensure all procurement activities support the Trust's strategic objectives.

Background

In line with the Procurement Act 2023, the Trust has committed to adopting a modernised procurement approach that focuses on simplification, fairness, and the integration of social and environmental considerations. The Trust's procurement strategy reflects its educational mission, ensuring that every procurement decision contributes to the improvement of student outcomes and the effective operation of the Trust.

2. LEGAL AND REGULATORY FRAMEWORK

Overview of the Procurement Act 2023

The [Procurement Act 2023](#) is a pivotal piece of legislation that governs public sector procurement in the United Kingdom. It replaces the Public Contracts Regulations 2015 and introduces key reforms aimed at simplifying procurement processes, promoting fairness, and increasing transparency. The Act sets out detailed

procedures for purchasing goods, services, and works and emphasises social value, environmental sustainability, and diversity.

Compliance with the Procurement Act 2023

The Trust's procurement activities must comply with both the Procurement Act 2023 and the associated public procurement regulations. These include the need to follow competitive procedures, ensure transparency in awarding contracts, and maintain records for auditing and scrutiny. The Act also requires the Trust to adopt procurement practices that are consistent with broader public sector goals, such as environmental sustainability and social inclusion.

Compliance with EU and National Regulations

While the UK is no longer part of the European Union, many public procurement principles remain aligned with EU best practices. Compliance with national regulations and any remaining EU-derived obligations is essential for ensuring transparency, fairness, and competition in procurement.

The Bribery Act 2010

All staff should also be aware of The Bribery Act 2010, which came into force in April 2011. The Trust, its employees and contractors/bidders are all covered by the Act.

Freedom of Information

The Freedom of Information Act 2000 gives the public and potential suppliers the right to request certain information regarding Academy and Trust purchasing. All such requests should be handled in accordance with the Trust policy.

3. GOVERNANCE STRUCTURE

This Policy is the responsibility of the Head of Procurement and Contracts. It is the responsibility of the Governing Body and Headteacher of each school, and the Board of Trustees and CEO for the Trust, to ensure that their school/service and its staff adhere to this Procurement Policy; in implementing this Policy the Governing Body, Headteachers and Trust staff must take account of any advice given to them by the Head of Procurement and Contracts, CEO and/or Board of Trustees.

When procuring on behalf of schools the Head of Procurement and Contracts is acting as an 'Agent' in creating binding terms and conditions for the school. Wherever a school undertakes any procurement independently then the Headteacher will be acting as an agent of the Trust and should ensure procurement is compliant with the Finance Procedures Policy & Scheme of Delegation of Financial Powers and this Procurement Policy and procedures and guides.

The Head of Procurement and Contracts is referred to throughout this document; however, procurement or purchasing may be undertaken by school staff only in

accordance with the Finance Procedures Policy, Scheme of Delegation of Financial Powers and procurement thresholds referred to in this policy.

4. WHAT IS PROCUREMENT?

Procurement is the process through which goods, services and works are acquired. The procurement process spans a life cycle from identification of need and resources, through selection of suppliers, purchasing, contract management and disposal. Purchasing is the transactional process of buying the goods/services and is just one part of Procurement.

5. CIPS CODE OF CONDUCT

The Chartered Institute of Procurement & Supply has a [Code of Conduct](#) which the Head of Procurement and Contracts complies with. The following four key principles must be applied by all Trust Staff:

- Members of staff must not allow or foster any suspicion of any conflict between official and private interests.
- Members of staff must not be influenced by any gift/consideration or show favour or disfavour to any person or organisation.
- Relationships and interactions with suppliers must be honest, fair and even-handed.
- Standards must be promoted through leadership and supported by systems, procedures and policy.

6. PROCUREMENT PRINCIPLES

Value for Money (VFM)

Value for money is at the heart of the procurement process. It is not solely about choosing the cheapest option but ensuring the best balance of cost, quality, and delivery. VFM assessments will consider total life-cycle costs, quality standards, and supplier reliability.

Transparency and Accountability

Transparency ensures that procurement decisions are made openly, with clear records of decision-making processes. This promotes accountability and builds trust with suppliers and stakeholders.

Fairness and Equal Treatment

The Trust will ensure that all suppliers are treated fairly, with no discrimination or bias. Suppliers will be provided with equal opportunities to participate in procurement processes.

Sustainable Procurement

Sustainable procurement will be integrated into all procurement decisions, ensuring that environmental and social considerations are taken into account. This includes using sustainable materials, reducing carbon footprints, and supporting local economies.

Social Value and Ethical Sourcing

The Trust is committed to ethical sourcing practices, which include ensuring fair labour practices, human rights compliance, and supplier adherence to environmental standards. The procurement process will prioritise suppliers who align with the Trust's values and social responsibility goals.

7. PROCUREMENT STRATEGY

The procurement strategy outlines how the Trust will approach procurement over the coming year. It includes an assessment of procurement needs and the identification of key objectives related to value for money, sustainability, and social impact. The strategy is reviewed annually and updated based on the Trust's evolving needs.

8. COMMERCIAL AND PERSONAL DATA

All staff must protect intellectual property rights and commercial information from unauthorised access by third parties, or misuse by the parties bound by a contract.

The Trust's Head of Procurement and Contracts may recommend having a separate confidentiality agreement if the information that the supplier/contract will have access to is highly sensitive.

All suppliers or third parties that require access to the information systems as part of the service they provide must comply with the requirements of the General Data Protection Regulations.

In the event of a contract being transferred or terminated appropriate provisions must be in place to ensure the continued security of information and systems. Suppliers/third parties will be asked where appropriate to demonstrate their compliance with Trust policies.

9. ACHIEVING VALUE FOR MONEY

Competition promotes efficiency and effectiveness in expenditure. Awarding contracts on the basis of value for money following competition contributes to the competitiveness of supplies. Therefore, the Head of Procurement and Contracts will advertise Trust supply requirements where the procurement thresholds show competition is necessary.

Contracts will be awarded on the basis of who has provided the most advantageous tender (MAT). This is one where it is not only the costs that is important, but also consideration is given to capability, delivery and added value.

Value for money is the optimum combination of whole life cost and quality (or fitness for purpose) to meet the user's requirement. This is rarely possible with the lowest price alone.

The signing of contracts should only be signed in accordance with Finance Procedures Policy and Scheme of Delegation of Financial Powers.

Where there is an issue concerning terms and conditions, whether the Trust's own or that provided by a supplier, then members of staff should refer these to the Head of Procurement and Contracts for advice and direction. The Head of Procurement and Contracts may seek formal commercial law advice if required.

10. COMPETITIVE TENDERING

Tendering procedures may take up to 6 months or longer depending on life cycle cost and compliance with legislation, failure to programme sufficient time for procurement will not be a reason to grant a procurement dispensation.

Subject to the thresholds in section 15, competition should be proportionate to the level of expenditure, complexity and risk.

There are two forms of competitive tender procedure, these are the open procedure and the competitive flexible procedure:

- **Open Procedure:** The open procedure is a single-stage tendering procedure that allows all interested suppliers to submit a tender. Under the open procedure, all information must be provided at the point of tender and must be made available to all suppliers.
- **Competitive Flexible Procedure:** the competitive flexible procedure is multi-staged. Contracting authorities have the option to include a 'participation stage' at the beginning of the procurement process to limit the number of suppliers involved in the procurement. This should be done by assessing suppliers against the conditions of participation and/or any other objective criteria set out in the tender notice or associated tender documents.

Thereafter, the contracting authority has the freedom to design its own procedure. Various processes may be included within the procedure. These may include dialogues, negotiations, presentations, audits, site visits or demonstrations.

As a minimum a tender pack must contain:

- Tender document detailing any minimum criteria the supplier must meet and tender return date.
- Detailed specification requirements including pricing schedule where applicable.
- Evaluation criteria against which the submitted tender will be evaluated. This must include details of criteria, sub criteria and weightings that are being applied and details of the information that the tenderer needs to include in their response.
- Terms and Conditions.

Care should be taken to specify accurately the goods/services required in a way which is unambiguous, offers equality, removes barriers to participation by Small and Medium Enterprises (SMEs), and self-employed people without discriminating against others.

Any post tender bid clarification with suppliers will be led by the Head of Procurement and Contracts.

Any communication with the suppliers involved in the tender process will be facilitated by the Head of Procurement and Contracts.

11. DISPENSATIONS

In limited circumstances a dispensation from the requirement to obtain alternative quotes may be granted by the Head of Procurement and Contracts. This may include authority to solicit a single quotation, to award a contract or place an order without having obtained the requisite number of tenders or quotations or to directly award a contract.

All dispensations require prior approval from the Head of Procurement and Contracts before progressing and must not result in a breach of procurement legislation or be contrary to the Finance Procedures Policy or the Scheme of Delegation of Financial Powers.

Dispensations from the requirement for competitive quotations/tenders must not be used to avoid competition, or for administrative convenience, or to award fresh/further work to a supplier originally appointed through a competitive procedure.

All dispensations will be subject to obtaining and documenting appropriate evidence for single quotation/tender action, obtaining authorisation for such action in

accordance with the relevant Scheme of Delegation of Financial Powers and never breaching the current regulations or the relevant public procurement thresholds.

Subject to approval as outlined in the Trust Scheme of Delegation of Financial Powers, dispensations may be granted for the following reasons:

- Unforeseen emergency requirement.
- Lack of appropriate tenders in a previously advertised procurement.
- Technical Continuity, artistic reasons or reasons connected with the protection of exclusive rights.
- Additional works or services which were not foreseen at the time of original contract award.
- The goods or services are only available from one source and there is no possibility of the Trust's requirements being met in any other way.
- Where the seeking of tenders and subsequent contract award could cause significant operational difficulties and where any potential efficiencies would be outweighed by those operational issues (which along with a Value for Money analysis must be documented); and only for use in circumstances to be approved in accordance with the Finance Procedures Policy and the Scheme of Delegation of Financial Powers, under the specific advice and approval of the Head of Procurement and Contracts in terms of compliance with UK legislation.

A record of the reason(s) for the seeking and granting/declining of dispensations will be kept for at least six years.

A copy of the Waiver Request Form can be found at Appendix A.

12. FRAMEWORK AGREEMENTS

The Trust will, wherever possible, use collaborative procurement in the sourcing of goods and services to achieve value for money. This may involve the use of framework agreements negotiated nationally, for the sector, or locally with other partners.

It is preferred that closed mini competitions are conducted if requirements can be met through pre-existing frameworks. Preference is given to frameworks that require the additional completion of a mini competition; this ensures that suppliers have been pre-approved, maximum charge rates should be known and terms and conditions of engagement are pre-agreed.

Where a collaborative framework exists for the provision of required goods and/or services these should be used (unless agreed otherwise by the Head of Procurement and Contracts) for the following reasons:

- Competitive pricing, benefiting from economies of scale and greater negotiating resource in compliance with the Procurement Act 2023.
- Authorised suppliers on such contracts have been vetted for financial health, insurance status, trading references, health and safety, quality, and corporate and social responsibility policies.
- Redress: benefit from well-defined terms and conditions as well as support from the buying consortium should any issues arise.
- An existing framework provides adequate information on technical standards and facilitates dialogue with approved suppliers, generating a more informed procurement decision and cost avoidance.

When utilising these frameworks, the Trust is not obliged to undertake its own fully compliant tender exercise.

Whenever using a framework agreement, it is essential to consider whether:

- The Trust is entitled to call off from the arrangement.
- The specification and the contract terms are suitable for the Trust's particular needs. The terms and conditions from frameworks are generally set in advance and cannot be changed beyond the mechanism set out in the framework.

The Trust must follow the framework's guidance, particularly about how orders should be placed. This will generally permit either direct awards of contracts to a supplier and/or a further round of mini competition between all suppliers with capacity to deliver the requirement on the framework.

13. SUSTAINABILITY

All Trust procurement should take account of environmental, social and economic factors; and should include but not limited to, looking at what products are made of, where they have come from and who has made them.

The Trust apply the principle of 'whole life costing' to promote sustainable procurement. This looks at all life-cycle costs (including disposal costs) of a product or service and makes sure they are minimised.

The Head of Procurement and Contracts will use sustainability criteria, for instance, the [Government Buying Standards](#), and will consider supplier policies for waste, transport, energy, procurement and staff awareness of environmental impact in its selection/award questionnaire and specification. It will also use the criteria in the tender evaluation and may ask suppliers to submit alternative goods or services that are more sustainable.

Where sustainability factors in the supply chain are particularly important, the Head of Procurement and Contracts will speak to the supplier to understand the sustainability risks and how they are managed and mitigated.

The Trust will encourage supply base to investigate and minimise the environmental impacts of supplying the Trust, including resource use, waste, energy consumption and carbon emissions.

14. FINANCIAL AUTHORITY TO COMMIT EXPENDITURE

Any process which involves committing the school/Trust to expenditure must be approved in accordance with the Finance Procedures Policy and relevant Scheme of Delegation of Financial Powers. The Scheme of Delegation of Financial Powers confirms who has the authority and to what financial level.

No member of staff is authorised to commit to expenditure without first ensuring that there is adequate budget provision.

Schemes of work should not be artificially broken down into smaller orders to phase the generation of purchase orders and thereby circumvent either authorisation levels or the requirement to obtain further quotes/tenders.

15. PURCHASING THRESHOLDS

Subject to the Finance Procedures Policy and relevant Scheme of Delegation of Financial Powers thresholds, competitive purchasing should be proportionate to the level of expenditure, complexity and risk. This minimises procurement costs for the Trust and suppliers, avoids doubt and ensures compliance with legislation, best practice and the Finance Procedures Policy.

There are two types of thresholds governing procurement:

- authority to commit expenditure, which is covered in the Finance Procedures Policy and Scheme of Delegation of Financial Powers and;
- the procurement process which is governed by the anticipated lifecycle cost of the procurement.

Where the purchase is being made from a framework agreement that has been through a compliant tender process in line with the Procurement Act 2023 then an order may be placed without having to follow the above procurement processes providing that it follows any procedures set out under the contract. The Head of Procurement and Contracts will be able to advise on the correct procedure and provide advice on the relevant frameworks.

The various thresholds and procurement process required is detailed below:

Orders up to £5,000 (up to £10,000 for centrally led work projects)

In the first instance, a supplier should be chosen from the list of approved suppliers, where available. A quote or price should be obtained before any supply or service is

requisitioned, except in the case of maintenance calls where the duration and final cost is unknown at the time of call out. If the budget holder considers that better value for money can be obtained by ordering from a supplier not on the approved supplier list, i.e. a better price is found on the internet, this must be discussed with the Executive Business Manager (EBM).

Orders over £5,000 up to £25,000 (£10,000 to £25,000 for centrally led work projects)

Use of an appropriate framework agreement or at least three quotations (which could be for example by email or catalogue prices) should be obtained for all orders between £5,000 and £25,000. Approval required by Headteacher and EBM or Executive Director.

Orders over £25,000 up to £50,000

Use of an appropriate framework agreement or at least three formal written quotations for all orders with a value between £25,000 and £50,000. Approval required by Headteacher and EBM or Executive Director and Director of Finance.

Orders over £50,000 to £100,000

Use of an appropriate framework agreement or advertise and run a competitive tender process or for centrally led construction contracts, closed tenders to a group of high performing contractors.

Advice should be sought from the Head of Procurement and Contracts.

Approval required by Headteacher or Executive Director and EBM and Director of Finance.

Orders over £100,000

Use of an appropriate framework agreement or advertise and run a competitive tender process or for centrally led construction contracts, closed tenders to a group of high performing contractors.

Advice should be sought from the Head of Procurement and Contracts.

Approval required by the Finance Committee.

Orders over £207,720 (£5,193,000 for works orders)

Use of an appropriate framework agreement or run a Procurement Act 2023 compliant process. Compliant processes must involve publishing the relevant notices required under the Procurement Act 2023 on the government's 'Find a Tender' website.

Advice should be sought from the Head of Procurement and Contracts.

Approval required by the Finance Committee.

16. RAISING ORDERS

Following the raising of a requisition, official orders must be raised for all goods, works, services and/or consultancy required by the Trust or a school using the PSF system, unless specifically exempted. The purchasing process must contain adequate controls to ensure that:

- Official orders are raised in respect of all goods, services and works required by the Trust and its schools.
- Only goods, services and works required by the Trust and its schools are ordered.
- Competitive quotations or tenders are obtained for all orders where the value of goods, services or works, individually or for a series of contracts, would exceed the relevant financial thresholds as set out in section 15 of this policy.
- Orders for goods, services and works are placed with the most appropriate suppliers in terms of cost, quality and delivery.
- Goods, services and works received are in accordance with those ordered.
- Payments are made only in respect of invoices authorised in accordance with the approved Scheme of Delegation of Financial Powers and the Trust's funds are adequately safeguarded.
- All payments are accounted for properly, promptly and in full.
- Relevant, timely and accurate management information on non-pay expenditure is produced and utilised.
- Adequate physical and logistical security is in place.

Further guidance regarding the raising of requisitions and purchase orders can be found in the Trust's Finance Procedures policy.

Specific exemptions to the requirement to raise an official purchase order are expected to be limited to:

- Salary and overtime costs for Trust employees, providing that accruals are posted at month end.
- Business rates.
- Petty cash and credit card purchases.
- Utilities.

No orders shall be placed, or contracts altered or extended, with the intention of avoiding the relevant thresholds applicable in the Scheme of Delegation of Financial Powers or section 15 of this policy.

In the event that the terms of any purchase order or contract have to be amended, an official variation order must be approved and issued accordingly. Small pricing variations on invoices, such as price increases on stationery orders, can be adjusted accordingly.

17. PREFERRED SUPPLIER REGISTER

A preferred supplier is one with whom an agreement/contract which could include price discounts, delivery arrangements, customer service requirements, etc. for a specified period of time, has been chosen by the Head of Procurement and Contracts. The Preferred Supplier Register formalises the relationship with suppliers who are selected based on procurement volume, quality and strategic and economic benefits to the Trust.

A preferred supplier may also be a supplier who is part of a purchasing consortium which provides national and/or regional contracts. These consortium suppliers offer deeper discounts because of the combined purchasing volume of Trust and other settings affiliated with the consortium.

For a supplier to be included in the register the Head of Procurement and Contracts will complete a competitive selection process.

Suppliers on the register are deemed to have met the Trust requirements for Best Value and therefore any purchases made through them are not subject to the obtaining the required quotes.

18. TERMS AND CONDITIONS

All procurement should be carried out using the trust terms and conditions. There may be certain exceptions to this where the use of an established framework or access to specific software requires it. Any departure from Trust terms and conditions must be approved by the Head of Procurement and Contracts before agreement is made.

Any agreement, contract or lease with a supplier which requires a signature by a member of the trust (excluding general orders for goods and services), should be forwarded to the Head of Procurement and Contracts for review prior to signature.

Following the identification of the most favourable offer, whether by best value, quotation or tender, consistent with the thresholds identified above, contracts may only be awarded by those officers to whom the Trust Board has delegated such authority within the approved Finance Procedures Policy and Scheme of Delegation of Financial Powers.

19. CONTRACT MANAGEMENT

Contract management is a crucial component of the procurement process, ensuring that all agreements entered into by the Trust are effectively administered and monitored throughout their lifecycle.

This involves the systematic oversight of contract creation, execution, and analysis to maximise operational and financial performance, while also minimising risk.

Key aspects of contract management include:

- Maintaining clear documentation.
- Ensuring compliance with contractual terms.
- Managing supplier relationships.
- Addressing any variations or disputes promptly.

By establishing robust contract management practices, the Trust can ensure value for money, legal compliance, and the successful delivery of goods and services in line with organisational goals.

It is the responsibility of the EBMs and Headteachers to manage locally procured individual school contracts with guidance and support provided by the Head of Procurement and Contracts as and when required.

It is the responsibility of each central directorate to manage centrally procured contracts with guidance and support provided by the Head of Procurement and Contracts as and when required.

20. INSURANCE

It is essential that the Trust ensures that suppliers have in place acceptable levels of insurance indemnity cover for public liability, employers and professional indemnity as relevant. Advice on relevant levels can be obtained from the Head of Procurement and Contracts.

21. LEASES

Schools may enter into finance or operating leases subject to the approval from the Director of Finance. Please refer to the Academy Trust Handbook for further information.

22. PAYMENT AND PAYMENT TERMS

All invoices from suppliers should be entered onto the finance system immediately and the invoice placed on hold to await approval.

Unless a credit card has been used to make a payment, all invoices from suppliers should be paid by BACS once approved.

The Trust's standard payment terms are 30 days following receipt of a correct invoice, unless alternative arrangements have been agreed by procurement staff at purchase order stage.

Payment should only be made on receipt of goods. Where services are being procured then payment for work in progress or agreed interim stages may be appropriate in accordance with the approved guidance and subject to approval by the Director of Finance.

23. CREDIT CARDS

All cardholders must adhere to the Finance Procedures Policy when making credit card purchases.

24. AGGREGATION

The Procurement Act 2023 sets out how and when multiple orders and contract values for the same type of work should be added together for the purposes of deciding what procurement process is applicable.

Schools manage their own budgets and purchasing decisions independently, seeking advice and support of Central Services to procure goods and service on their behalf, where necessary and appropriate, school expenditure in this instance does not aggregate across the trust.

The Head of Procurement and Contracts may identify opportunities to establish contracts on behalf of schools. Schools will be invited to participate though the Head of Procurement and Contracts will work on the basis that this expenditure does aggregate and procure accordingly.

Procurement should not be artificially broken down into multiple small orders to circumvent authorisation levels.

25. CONTRACTS REGISTER

The Head of Procurement and Contracts will maintain a contracts register for all centrally procured contracts.

The EBMs will maintain individual school contract registers for locally procured contracts.

26. PROCUREMENT PLANNING

The Head of Procurement and Contracts will complete an annual procurement plan setting out key tender activity and milestones. The plan will include the use of the contract registers to plan the requirement for future tenders on going reviews of contracts, strategic areas of development, and any policy and procedural developments that are required.

The Trust is committed to the preparation and the continued development of the procurement plan. The Head of Procurement and Contracts will continually review the procurement requirements of the Trust whilst complying with all relevant legislation.

The practice of renewing annual contracts is not permissible unless specific provision has been made within the original procurement process for contract extensions. Re-procurement should feature on the annual procurement plan and be commenced in a timely manner to ensure completion and transfer to a new contract is managed effectively.

To avoid the inefficiencies of re-procuring services annually, the Head of Procurement and Contracts will work with EBMs and Headteachers to review procurement plans and develop multi-year contracts where appropriate.

27. RETENTION OF DOCUMENTS

Tender or quotation documentation should be retained for a minimum of six (6) years from the date of the end of the contract. Documentation may be retained electronically rather than in hard copy, however it must be readily accessible for audit or other purposes if required.

Where procurement is undertaken centrally on behalf of a school, all documentation in relation to the procurement process will be retained centrally. EBMs and Headteachers need not hold local copies and can rely on notification from the Head of Procurement and Contracts that the Trust Financial Regulations and relevant procurement legislation has been complied with. The records held centrally are available should auditors wish to inspect them.

28. MONITORING AND AUDIT

The Trust and its schools are subject to scrutiny by internal and external auditors as well as the ESFA and other government departments/organisations. It is the responsibility of everyone involved in the purchasing process to ensure that they are compliant with current policies, procedures, guidance and legislation.

POLICY HISTORY

Date	Summary of change	Contact	Policy Implementation Date	Review Date
January 2025	Policy created	Head of Procurement & Contracts	February 2025	February 2026
January 2026	<p>Amendment of Procurement Act 2023 purchasing thresholds in section 15 as per legislation change.</p> <p>Amendment of Appendix A – to include ‘Headteacher’ for signing the waiver for values under £25k.</p>	Head of Procurement & Contracts	February 2026	February 2027

Appendix A

Procurement Waiver Request Form

This Procurement Waiver Request Form must only be used in circumstances where usual procurement processes cannot be applied. This form is intended as a means of providing formal authorisation to waiver from specific elements of the Procurement and Contract Governance Rules.

If in any doubt as to whether a waiver form is required, please first contact the Head of Procurement and Contracts for advice via email.

Where there are elements of the requirement that are IT related, Procurement will reserve the right to check with IT to confirm the request is suitable.

If the value of this waiver is **below £25k** then only the Director/Head of Dept/Headteacher will need to sign it off.

In addition to the above if the value is **above £25k** then this will also need to be signed off by the Director of Finance.

This form will need to be sent to procurement@reachsouth.org for final approval and final sign off, by the Head of Procurement and Contracts.

All dispensations will be subject to obtaining and documenting appropriate evidence for single quotation/tender action, obtaining authorisation for such action in accordance with the relevant Scheme of Delegation of Financial Powers and never breaching the current regulations or the relevant public procurement thresholds.

Please ensure the waiver is completed in full and signed off. Failure to do so will result in a delay to the processing and/or approval of your waiver.

Requester details	
Name:	
Department:	
Phone number and email:	
Date submitted:	
Type of waiver requested (Please place an 'X' next to the appropriate type of waiver request)	
Lack of appropriate tenders in a previously advertised procurement	
Technical Continuity, artistic reasons or reasons connected with the protection of exclusive rights	
The services, supplies or works can only be provided by one particular supplier (one source)	
Urgent or emergency operational equipment or services	

Additional works of services which were not foreseen at the time of original contract award	
Where the seeking of tenders and subsequent contract award could cause significant operational difficulties and where any potential efficiencies would be outweighed by those operational issues.	
Description	
<p>For example:</p> <ul style="list-style-type: none"> • Detailed explanation of exactly what is being bought in which quantity and what purpose the goods are for, or explanation of works, timescales etc. • Provide procurement project reference/purchase order number if previously tendered. • If a current supplier, please provide a short assessment of current performance to date. <p>Insert detailed explanation below:</p>	
Financial and contractual details	
Name of proposed supplier:	
Estimated contract value: (total, not annual)	
Total value of extension/variation: (If applicable)	
Duration of contract/extension:	
Terms and Conditions proposed: (Please attach copy)	
Justification	
<p>Please explain what steps will be taken to ensure that the Trust demonstrates probity and gets best value in this contract? Examples of this could include:</p> <ul style="list-style-type: none"> • Details of any market research, competitive or benchmarking activity that has been carried out to determine this supplier is best suited. i.e. contacting multiple suppliers, web searches, supplier demo's, obtaining additional quote(s). (if you have any evidence of this please attach) • Evaluating and considering potential alternative proposals. • Reviewed any associated potential risks to the Trust. i.e. supplier has the relevant warranties and accreditation for the service/works/goods they are providing. <p>Insert detailed explanation below:</p>	
Approval workflow – Electronic signatures are accepted	
<p>I the requester, confirm to the best of my knowledge that this request does not breach the Trust's Financial regulations and that there is a genuine requirement to submit this waiver request.</p>	
<p><u>Requester</u> Name:</p>	

Signature:

Date:

Director/Head of Dept

Name:

Signature:

Date:

Director of Finance (if over £25k ex VAT)

Name:

Signature:

Date:

Head of Procurement and Contracts

Name: Steven Strong

Signature:

Date:

Procurement Advice/Comments: