

Dawlish Federation of Special Schools

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Purchasing Policy

1. Overview

This policy is intended to promote a procurement environment based on the understanding that departments are in the best position to determine what goods and services are needed in their area of operations. Purchasing decisions are business decisions made on behalf of the school and therefore should be made with the utmost consideration of what is in the best interest of the school. This policy is intended to provide a framework to help ensure that school funds are used properly and wisely by staff when making purchases to support school in its delivery of a quality teaching and care provision.

2. Framework

- Approval -all goods and services purchased on behalf of the school have been approved by an appropriate person.
- Fit for purpose -all goods and services must be of a quality and design commensurate with school aims.
- All goods and services have been assessed for value for money (with cost being a key ingredient)
- All goods and services are purchased from reputable suppliers and that environmental and ethical issues are considered when placing orders.

3. Approval

Budgetary authority resides with the Head Teacher but under this policy, authority for budget spend is delegated to line managers (also known as budget holders). As part of this annual process, budget bids are submitted by line managers at the start of Easter Term with final approval of budgets in time for start of the new financial year on 1st April. Budgets cannot be overspent without agreement of the Head Teacher.

A budget holder is that person recognised both in the organisational structure and in the cost centre listing who has the authority to make purchases on behalf of the school in his or

her area of responsibility. Purchases can only be made to the extent of funds available in the budgets which are monitored on a regular basis and which may be revised by the Head Teacher.

Purchase requests for goods or services must be made on the purchase request form (copies of which are held in the meeting room or which can be obtained electronically from H Cummins, Business Manager). These must be signed off by the budget holder (email authorisation is acceptable) as authorisation to H Cummins to place order. Budget holders must ensure that they have funds in place before placing an order and this also will be checked by the business manager. Any request to exceed budget must be approved by the Head Teacher.

Approval Levels

- £0 - £300 – budget holder
- £300- £1,000 – approval also required from Head of Teaching, Care or Estates.
- £1,000 – approval also required from Head Teacher
- **Second Signatory** on purchase request is required for all orders over £300 to ensure that larger spends are subject to additional scrutiny both in terms of quality and cost. The second signatory is the head of teaching or care as appropriate.
- **Additional Quotes** are required for orders over £1,000 and it is recommended that 3 quotes be obtained. It is accepted that on occasions there will be instances where there is a preferred supplier offering a superior product which directly addresses our needs. In this case, the request to order must state this to allow the second signatory to assess and approve.
- **Preferred suppliers** are those regular suppliers (catering and premise consumables) who have already proved that they can provide a flexible and valuable service that the school relies on. Purchase orders are not required for these suppliers but scrutiny remains in place as expenditure in these areas remains subject to budgetary constraints and invoices are reviewed (by the Head Teacher) to ensure that these suppliers continue to provide value for money. Current preferred suppliers are:
 - Morris and McGuinn
 - West Country foods
 - Ilfracombe food supplies
 - MJ Baker
 - Denman Electrical supplies
 - DCC also publish a list of recommended contractors and suppliers which staff should consult for additional quotes and also to ensure that we continue to deliver value for money on our purchases.

4. Fit for purpose

The primary requirement of the purchase is that the product or service should be of sufficient quality to ensure that the school is able to provide the quality provision necessary to achieve a judgement of good or better in any Ofsted inspection. This assessment relies on the knowledge and experience of the budget holder who knows what he or she needs in order provide this level of quality for teaching, care or the surrounding school environment. **Cost of purchase** is a very important factor in this assessment but the product/service must also be of acceptable quality adding value to the school.

5. Ethics and good practice

Ethical business standards should govern all procurement transactions with staff ensuring that purchases are from reputable suppliers favouring regional suppliers before national ones, not just to promote this region but also to minimise transport distance bringing goods or services to school.

Staff should not be influenced in their decisions by acceptance of a significant gift from any supplier or prospective supplier. A “significant gift” is defined as any item, service, favour, monies, discount or credit not available to others that could influence purchasing decisions.

The purchasing process completes with the approved purchase request being passed to the Business Manager who will place that order with the supplier letting the requester know if there any difficulties with delivery or availability. The Business Manager retains the right to place the order using the cost centre and authoriser as the purchase order reference in order to avoid duplicating process on SIMS both at time of placing order and also when matching subsequent invoice to order. System generated orders will be used for high value amounts over £500.

6. Utilities (long term contracts)

Utility providers are subject to the same scrutiny as other suppliers when contracts come up for renewal. At the moment all gas and electricity is provided through Kent County Council which operates on behalf of multiple local authorities to achieve bulk buying discounts. Water is provided through South West Water as a monopoly supplier. School does not operate premise contracts but the site manager reviews periodic maintenance requirements as they become due following purchasing guidelines. Other contracts are reviewed as they arise with approval for contract to existing or new supplier approved by Head Teacher.