St John Lloyd RC Primary School

Procurement, Quotation and Tendering Policy

1. Purpose

The Governing Body of St John Lloyd RC Primary School is committed to achieving value for money, ensuring fairness, transparency and accountability in the expenditure of public funds. All procurement activities will comply with the requirements of Cardiff Council and relevant procurement legislation

2. Scope

This policy applies to all staff, governors and budget holders involved in purchasing goods, services or works on behalf of the school.

3. Procurement Principles

All purchasing decisions must:

- Demonstrate value for money.
- Be open, fair and transparent.
- Avoid conflicts of interest.
- Be appropriately authorised.
- Be supported by documented evidence.
- Consider approved Cardiff Council and Welsh framework contracts before seeking alternative suppliers.

4. Financial Thresholds

Total Contract/Purchase Value	Requirement
Up to 4999.99	2 written quotes
£5,000 - £14.999.99	3 Written quotes
£15,000- £600,000	3 tenders
Above £60,000	Formal tender process undertaken with support from Cardiff Council Procurement Services.

5. Delegated Purchasing Authority

Headteacher

The Headteacher is authorised to:

- Approve expenditure within the approved budget.
- Sign purchase orders.
- Sign contracts and agreements up to £4,999.99
- Authorise emergency expenditure necessary for health and safety or business continuity.

School Business Manager / Finance Officer

The School Business Manager or Finance Officer may:

- Raise orders.
- Obtain quotations.
- Verify receipt of goods and services.
- Process invoices.

The School Business Manager or Finance Officer may not approve their own purchases.

Governing Body Finance Committee

The Finance Committee must:

- Review procurement exercises above £5,000
- Recommend approval of significant contracts to the Governing Body.
- Monitor compliance with this policy.

Full Governing Body

The Full Governing Body must approve:

- Any contract exceeding £10,000
- Multi-year contractual commitments.
- Procurements with significant financial or operational risk.
- Any departure from this policy.

6. Authorisation Limits

Officer	Authority Limit
Headteacher	Up to £4,999.99
Finance Committee	£5,000 to £9999.99
Full Governing Body	Above £10,000

7. Tender Evaluation

Tender submissions will normally be assessed against:

- Cost and value for money.
- Quality of goods or services.
- Relevant experience.
- References and performance history.
- Compliance with safeguarding requirements.
- Environmental and sustainability considerations.

Evaluation records must be retained for audit purposes..

No individual may authorise expenditure from which they personally benefit.

8. Contracts Register

The Finance Officer will maintain a Contracts Register containing:

- Supplier name.
- Contract value.
- Start and end dates.
- Renewal dates.

The register will be reviewed annually by the Finance Committee.

9. Conflicts of Interest

Staff and governors must declare any personal, financial or business interest relating to procurement decisions. Individuals with a conflict must withdraw from the decision-making process.

10. Record Retention

The school will retain:

- Quotations.
- Tender documentation.
- Contracts.

These documents shall be available for internal and external audit inspection.

12. Monitoring and Review

The Finance Committee will review compliance with this policy and recommend amendments to the Governing Body as required.