



Alexander Hosea Primary School

'Roots to grow, wings to fly'

PURCHASING POLICY

Mechanism for Authorisation of Spending

The following proposals are intended to cover all leasing arrangements and purchasing of equipment, materials and services for the school as identified in the annual budget with the exception of some key services which are purchased from South Gloucestershire Council (Integra) where advantage can be taken of lower rates made available to them due to bulk purchasing or where they offer specific expertise.

1. Authorisation

(a) Proposals for expenditure by Curriculum Leaders of above £50, within their curriculum budgets but not using a school order, should be referred to the Headteacher for approval in advance.

(b) Proposals for expenditure of up to £2,000 and within allocated budget should be approved by the Headteacher.

(c) Proposals for revenue expenditure between £2,000 and £5,000 should be referred to the Finance and Staffing Committee for approval.

(d) Proposals for revenue expenditure over £5,000 should be referred to the Full Governing Body for approval.

(e) Proposals for capital expenditure over £2,000 should be referred to the Full Governing Body for approval.

2. Tendering for contracts and equipment

As a guiding principle, all staff involved in making purchases, of any value, on behalf of the school should ensure reasonable efforts have been made to obtain good value for money.

(a) For contracts and single item purchases between £500 and £1,000

- at least two recorded best value price comparisons should be obtained either by telephone, internet or from catalogues

(b) For contracts and single item purchases between £1,000 and £5,000

- three recorded best value price comparisons should be obtained either by telephone, internet or from catalogues

- a record of the price comparisons should be kept on file using the pro forma at Appendix 1

- if three best value price comparisons cannot be obtained the reasons should be recorded and reported to the Finance and Staffing Committee

(c) For contracts and single item purchases above £5,000

- three written quotes should be sought

- a record of the quotes should be kept on file using the pro forma at Appendix 1
- if three written quotes are not received the reason should be recorded and reported to the Full Governing Body

(d) Recommended contractors should be used where applicable.

(e) Long term contracts (duration in excess of 12 months) and operational leases require the prior approval of the Director of Chief Executive and Corporate Resources. Finance leases are not permitted.

(f) Full tendering procedures are required for expenditure over £50,000. The school will follow EU procurement regulations for high value tendering and advice will be sought from the Local Authority.

Notes

(i) For instances where multiple purchases are being made on one purchase order, the total value of the purchases should be used when determining which of the above authorisation and tendering for contracts and equipment limits apply.

(ii) If multiple purchases are being made as part of a specific and discrete project, the total value of the purchases required should be used when determining which of the above authorisation limits applies. However the value of individual orders within the project should be used when determining which of the above tendering for contracts and equipment limits apply.

(iii) The above requirements also apply to purchases made by the Friends of Alexander Hosea School on behalf of the school.

(iv) In exceptional circumstances where an emergency purchase is required, a purchase can be made without obtaining the best value price comparisons noted above. However, the purchase must be authorised by the Headteacher up to £2,000 and by both the Headteacher and Chair of Governors over £2,000.

(v) In exceptional circumstances where a specialist purchase is required, a purchase can be made without obtaining the best value price comparisons noted above. However, the purchase must be authorised by the Headteacher up to £2,000 and by both the Headteacher and Chair of Governors over £2,000.

This policy should be read in conjunction with the Terms of Reference for the Finance and Staffing Committee and the Schedule of Delegated Authority.

This policy should be reviewed annually or in the event of a change of Head teacher or Local Authority regulations.

Equalities Impact Assessment (EIA)

This policy has been screened to ensure that we give 'due consideration' to equality of opportunity and has been agreed and formally approved by the appropriate reviewing and ratification Committee.

Original Author(s)	Allison Hall/Deb Williams	Date reviewed	18 th September 2017
Position	SBM/Head teacher	Date ratified	22 nd September 2017
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Version	Final	Reviewing Committee	Finance and Staffing

Appendix 1

Alexander Hosea Primary School

This form should be used to record price comparisons and quotes for single items above £1,000.

Project/Purchase:

Contractor/supplier details	Value	Comments (other details, discussion, problems/non return of requested quote)

Recommended
Contractor/supplier.....

Recommended at meeting
of.....

Approved
Contractor/supplier.....

Date approved by:

Head teacher
Date.....

F&S committee
Date.....

FGB
Date.....