

COMPETITIVE TENDERING POLICY

Learning Academies Trust
Effective from 24th February 2025

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CHANGES

Policy date	Summary of change	Author	Version	Review date
12/07/2022	Policy has been created.	Kay Mabin, CFO	1.0	31/08/2023
01/12/2022	Policy revised – capitalisation limit increased from £1,000 to £5,000	Kay Mabin, CFO	2.0	31/08/2023
01/09/2023	Policy reviewed.	Kay Mabin, CFO	2.1	31/08/2024
01/09/2024	Policy reviewed.	Kay Mabin, CFO	3.0	31/08/2025
24/02/2025	Policy reviewed to reflect Procurement Act 2023 (effective 24 th February 2025).	Kay Mabin, CFO	3.1	31/08/2027

1. AIMS/PRINCIPLES

This Policy applies to any contract for services, supplies or works which results in a payment being made by the Trust (including by an Academy).

Value-for-money - The basic principle is that procurement should deliver value for money to the Trust. The Trust wants to achieve the best value for money from all purchases and at all times. This means purchases need to be in the correct quality, quantity and completed within the appropriate timeframe and at the best price possible.

Planning - The procurement process should be considered before any purchase is made. Not all purchasing will require a competitive procurement process and more detailed rules apply for higher value contracts.

Leasing - There are specific rules under the Academy Trust Handbook in relation to borrowing, some types of leasing arrangements and novel/contentious transactions which require Secretary of State consent. Leases are outside of the scope of this Policy and you should seek guidance from the Trust's CFO. Trusts should seek advice from their professional adviser and/or external auditor if they are in doubt over whether a lease involves **permitted** borrowing.

Equality - All suppliers in a competition should be treated in a way which ensures equality of treatment, non-discrimination and transparency, for example:

- All bidders must be given the same information at the same time, and no bidder should be treated more favourably than another and
- There must be clear and transparent timescales, requirements, specifications and deadlines to comply with any competition.

Sustainable and ethical procurement – sustainability in supply chain management generally refers to continuous accountability for risk and negative impact caused by a range of actions along the supply chain. Sustainability efforts are also aimed at enhancing fairness and positive benefits for suppliers, workers, customers, end-users and any other stakeholders.

- Sustainable procurement takes a wider view and incorporates the net benefits for both the Trust and the wider world. It considers the impact of environmental, economic and social factors along with price and quality. This is important in terms of how the Trust conducts its relationship with suppliers, including contract negotiation especially when sourcing globally with unfamiliar work cultures. The Trust has a duty to lookout for signs of unacceptable practices in the supply chain such as fraud, corruption, modern-day slavery (see below), human trafficking and wider issues such as child labour.
- Ethical supply chain management is recognised by the Trust as important due to the changing nature of the business environment. Ethical issues have gained particular importance following publication of cases of unethical business practices and poor working conditions in developing countries. Public awareness on the issues of child labour is increasing pressure on all organisations to take care of the worker welfare at home and across entire supply chains.

The Trust is committed to ensuring sustainability in its contracts and will include relevant sustainability and ethical criteria in contracts where applicable. You should check with the CFO or central finance team if you are unsure.

Modern-day slavery - the Trust is required to comply with the UK Modern Slavery Act 2015. Service providers should provide positive confirmation that to the best of their knowledge slavery and human trafficking is not occurring in their own institution or in any of their supply chain.

Legality - the Trust is committed to the fair and effective application of laws and regulations throughout its supply chain. There is a positive duty on the Trust to report and refer any and all reasonably founded suspicions of illegal activity (for example, attempts at corruption, evidence of anti-competitive or cartel-like activity, breaches of employment or environment law, breaches of data protection regulations (GDPR)).

This policy is consistent with the Trust's policy to support, protect and where possible preserve the anonymity of 'whistleblowers', inside or outside of our organisation, who act in good faith, even if their suspicions should subsequently prove to be unfounded. The Trust will give full co-operation to legitimate authorities investigating such claims. That specifically includes the duty to ensure that any conceivably relevant documentation is preserved and made available, even if such documents could be construed adversely to the interests of the Trust. Please refer to the Trust Whistleblowing policy (Finance) for additional guidance.

Dealing with conflicts of interest

The Academy Trust Handbook puts strict obligations on the Trust to ensure that conflicts of interest in procurement are managed. It must be clear that there is no private gain in the Trust's contractual relationships

- Any interest which may affect the outcome of a procurement process must be declared. This includes all Members, Trustees, governors as well as members of the Academy's senior leadership team, finance team and budget holders.
- All Members, Trustees, Governors, members of the Academy's senior leadership team, finance team and all budget holders must complete the register of business interests and keep this updated at least once per year. You should speak to the Trust's Head of Governance for advice.
- There are rules in the Academy Trust Handbook in relation to payments to individuals/organisations which are 'related' or 'connected' to a member or trustee. In any such case the CFO must be informed before such expenditure is incurred. Any transactions with related parties must be reported for scrutiny as per the Academy Trust Handbook.
- A record of all such declared conflicts of interest must be sent to the CFO without delay who will determine what if any action can be taken to seek to remedy any such conflict of interest.
- A record must be signed by all those present at the tender opening which confirms that they held no pecuniary interests with any firms tendering.
- No gifts or hospitality should be accepted by any service provider as an inducement to award a contract to that supplier. This may be an offence under the provisions of the Bribery Act 2010. This includes free IT equipment. You must inform the CFO immediately on becoming aware of any such gifts or hospitality. Staff must make themselves aware of the Trust's gifts and hospitality policy and ensure it is complied with at all times.

Accountability and record-keeping

The Trust is accountable for its expenditure and the conduct of its affairs.

- Documented procurement and authorisation must be obtained prior to ordering (and payment) in accordance with this policy and the Trust's Scheme of Financial Delegation.

- Orders should be raised using the Trust-approved ordering process and PS Purchasing.
- All suppliers must be checked and verified in advance by the SFO/Central Finance Team.
- The coding such that it is clear how the purchase is to be accounted for and funded
- Invoices must be of an appropriate standard to ensure clear identification of the amount and value of goods and services being purchased.
- Contracts, business cases, quotations and supporting tender documentation (as applicable) should be recorded on the Trust contract register 'Every' for auditing purposes.

2. LEGISLATION AND GUIDANCE

The policy has been updated to reflect the Procurement Act 2023 (which came into force on 24th February 2024).

The **Procurement Act 2023** in the UK replaces the **Public Contracts Regulations 2015**, which implemented the EU Public Procurement Directive (2014/24/EU) into UK law.

The Procurement Act 2023 was introduced post-Brexit and aims to simplify and modernize procurement processes in the UK, with a focus on increasing flexibility, transparency, and efficiency. It consolidates procurement rules and provides a more streamlined approach to public procurement, moving away from EU regulations to suit the UK's specific needs and priorities.

This policy sets out the rules by which Learning Academies Trust (the "Trust") spends money and explains the Trust's approach to the purchase of goods, works and services for its schools.

The Trust is obliged to comply with:

- the Academy Trust Handbook
- Funding Agreements with the Department for Education (DfE)
- any DfE guidance including "Effective Buying for your School"
- the Procurement Act 2023
- UK Modern Slavery Act 2015
- Bribery Act 2010

It is important to note that the Trust is the sole legal entity which can enter into contracts for itself and any Academies. The Academies themselves are not separate legal entities and any contracts awarded by individual Academies will be binding on the Trust. All spend is recorded by the Trust to comply with DfE requirements as set out in this policy.

3. DEFINITIONS

Term	Definitions
DfE	Department for Education
PCR	Public Contracts Regulations
WTO	World Trade Organisation
GPA	Government Procurement Agreement
FTS	Find a Tender Service

4. WHO CAN PURCHASE GOODS & SERVICES?

Not all employees of the Trust can place orders or authorise transactions for the Trust. The details of the individuals authorised to enter into contracts for the Trust are set out in the Trust's Scheme of Financial Delegation which can be found within the Financial Procedures Manual & Finance Policy.

Spend/approval limits are also listed in this policy.

No contracts should be entered into at individual school level.

5. EXEMPTIONS TO THIS POLICY

This Policy must be followed in all but exceptional circumstances. Non-compliance may lead to disciplinary procedures.

In such exceptional circumstances, the Trust's Senior Management Team may request aspects of the policy are waived. Exceptional circumstances include, but are not limited to:

- **Disaster recovery** and a reasonable period of time prior to operating normally
- **Use of specialists.** On occasion, it may be preferable to contract a specific supplier given their technical expertise, specific prior experience working with the Trust and/or monopoly of a particular supply.
- **Time constraints.** If an issue emerges that requires a rapid response that could not be met if adhering to standard procurement rules.

Any exemptions should only be relied upon with express consent from those listed in 9.0 Scheme of Financial delegation.

6. PRE-PURCHASE CHECKLIST

1. Check the value of the planned procurement and the appropriate procurement rules (see below).
2. Check with the central finance team or IT/Estates Lead whether any other Academies or departments in the Trust need to make the same or similar purchase. If so, the spend should be included within the same contract.
3. Consider how the purchase is going to be sourced. Can the Trust use an existing framework agreement, or can another school provide the requirement?
4. Does a preferred supplier exist for Low-Value transactions?
5. Has funding been identified to pay for the transaction? If budget does not exist, is a virement required?
6. Is the proposed purchase in line with specific funding criteria (e.g. Pupil Premium, Sports Premium)?
7. As a minimum requirement, you must set out clearly what you want to buy. This means knowing in advance what you want the goods, works or services to do, together with the quantity, maximum cost and delivery / completion requirements.

7. FRAMEWORKS

In accordance with the Academy Trust Handbook and DfE policy, wherever possible, the Trust should avoid running its own procurement processes and instead use an existing framework arrangement which cover a wide range of areas.

Examples of existing procurement frameworks include those set up by:

- Crown Commercial Services
- Eastern Shires Purchasing Organisation
- Crescent Purchasing Consortium
- Schools Buying Club
- Yorkshire Purchasing Organisation

The benefits of frameworks are that they have already been through a competitive tendering process, appropriate legal and regulatory checks have been undertaken, and they have favourable terms and conditions. In addition, the framework provider may offer advice and support.

In each case, it is important that:

- the Trust is entitled to call off from the arrangement
- the specification and the contract terms are suitable for your 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 and
- you must follow the framework's guidance, particularly about how orders should be placed.

8. RENEWAL, EXTENDING OR VARYING EXISTING CONTRACTS

When renewing, extending or varying an existing contract, it does not have to go through the full process that is in place for new contracts (12.0 to 15.0) as we understand time and existing finances have been invested in systems and software that have previously been through the procurement process.

For example, the Trust have invested in the IRIS Financials software over several years.

For renewals, extensions or variations to contracts:

1. a requisition form must be completed
2. a purchase order must be raised in IRIS financials and must be approved by an authorised member of staff and within the limits contained within the financial scheme of delegation.
3. Sufficient budget must be available.
4. Added to the contracts section on EVERY.

Existing contracts are presented to the Finance Committee as part of the annual budget-setting process.

All contract extensions or variations will be reported to the Finance Committee on a regular (termly) basis within the CFO report.

For the purpose of calculating contract values, all amounts should be taken as net of VAT, where applicable.

9. SCHEME OF FINANCIAL DELEGATION

Different rules apply depending on the value of the purchase being made. The Trust's current spend thresholds are set out below and in the associated Scheme of Financial Delegation which can be found in **Appendix B of the Trust's Finance Policy & Financial Procedures Manual**.

Threshold	Category of procurement	Authority to approve (exclusive of VAT)
Up to £5,000	Low value	Up to £1,000 HT/EHT
£5,001 to £30,000	Medium value	Up to £10,000 TMA/EL
		Up to £20,000 DCFO
£30,001 to £100,000	High value	Up to £50,000 CFO
		Up to £100,000 CEO
Above £100,001	Very High Value	Above £100,001 Finance Committee

Please refer to the Financial Procedures Manual/Finance Policy for specific limits e.g. staff training which still apply.

Budget Holder – as listed in the Financial Procedures Manual/Finance Policy.

The CFO reserves the right to suspend a budget holder from their finance duties if Trust purchasing procedures are not adhered to.

The specific procurement rules for each value of procurement are set out below.

Authority to approve assumes there is sufficient budget remaining to enable the transaction to proceed and there will not be any detriment on potential future expenditure.

If sufficient budget is not readily identifiable, a proposal for virement of funds may be appropriate (see section 10) and/or a request for funding from alternative sources or Trust reserves.

Any new request for funding from Trust reserves must be pre-approved in accordance with the Trust's Reserves policy.

10. VIREMENT OF FUNDS

Where insufficient funds exist within a budget to cover the cost of a proposed transaction, a budget holder may seek approval from the central finance team to move funds from another budget to meet the shortfall.

Approval for the virement of funds must be submitted to the school's finance team for review and approval.

Where insufficient approved budget exists to fund a transaction and virement has not been approved the central finance team/CFO reserve the right to reject the order.

11. VALUING YOUR PROCUREMENT

It is important that any procurement is properly assessed for value.

In particular, you must not deliberately divide one contract into smaller contracts or artificially reduce the value of a planned purchase with the effect of avoiding the procurement rules.

The contract value is based on the total value of the spend **over the life of the contract** which is the subject of the procurement.

This is the reason why the Trust has overall oversight and leads in procurement.

If you do not know what your exact spend is going to be over the life of the contract, you should calculate the 'reasonably foreseeable' spend taking an average annual spend and multiply by the estimated duration of the contract (including any known extensions or options to renew).

FOR ALL NEW CONTRACTS

12. LOW VALUE TRANSACTIONS (UP TO £5,000 EXCL. VAT)

For all transactions with a total value of **less than or equal to £5,000** (exclusive of VAT):

1. competitive quotes are not needed but 3 x Value for Money checks must be undertaken before a purchase order can be approved.
2. These 3 VFM checks must be logged on the procurement spreadsheet and retained for audit purposes and saved in the schools procurement folder in sharepoint.
3. For contracts & Service Level Agreements, a copy with all associated paperwork must be uploaded to the Trust's contract portal 'Every'.
4. A purchase order **must** be raised in IRIS financials and be approved by an authorised member of staff and within the limits contained within the financial scheme of delegation.
5. No goods or services are to be procured until confirmation of approval is received.

Low value transactions will be subject to regular spot checks by the central finance team.

13. MEDIUM VALUE TRANSACTIONS (£5,001 TO £30,000)

For Medium Value Transactions with a value between **£5,001 and £30,000** (exclusive of VAT):

1. **3 x** competitive quotes are required.
2. These 3 quotes must be logged on the procurement spreadsheet and retained for audit purposes and saved in the schools procurement folder in sharepoint.
3. For contracts & Service Level Agreements, a copy with all associated paperwork must be uploaded to the Trust's contract portal 'Every'.
4. A purchase order must be raised in IRIS financials and must be approved by an authorised member of staff and within the limits contained within the financial scheme of delegation.
5. No goods or services are to be procured until confirmation of approval is received.

14. HIGH VALUE TRANSACTIONS (£30,001 TO £100,000)

For High Value Transactions with a value between **£30,001 and £100,000** (exclusive of VAT):

1. the Trust's tender pack must be produced and suppliers invited to tender for the goods/services.
2. All tenders must be logged on the procurement spreadsheet and retained for audit purposes and saved in the schools procurement folder in sharepoint.
3. For High Value and Very High/Upper Threshold transactions, signed contracts, tender documents, tender assessments and any relevant meeting minutes must also be uploaded to the Trust's contract portal 'Every'.
4. A purchase order must be raised in IRIS financials and must be approved by an authorised member of staff and within the limits contained within the financial scheme of delegation.
5. No goods or services are to be procured until confirmation of approval is received.

15. VERY HIGH TRANSACTIONS BETWEEN £100,001 AND UPPER THRESHOLD (>£214,904)

For High Value Transactions with a value between **£100,001 and £214,904** (exclusive of VAT):

1. please follow the guidance for High Value Transactions.
2. In addition, Finance Committee approval must be sought to tender for the supply of goods and services and once the tender process has been completed, they must review and award the tender.
3. Only then can the tender be awarded to the successful supplier.

16. RULES ON OPENING TENDERS

Tenders for a High Value or Very High/Upper Threshold procurement must be:

1. provided in hard copy only.
2. All hard copy tenders should be addressed to The Chief Finance Officer, Central Finance Team, Salisbury Road Primary School, Salisbury Road, Plymouth, PL4 8QZ.
3. All tenders must be clearly marked as 'TENDER DOCUMENTS' to ensure they are kept sealed until the time specified for all tenders to be opened.
4. All tenders must be kept secure until the time specified for all tenders to be opened.
5. All tenders submitted should be opened at the same time and the tender details should be recorded.

A minimum of two persons should be present for the opening of tenders:

- Chief Executive Officer (CEO)
- Chief Finance Officer (CFO)
- Deputy Chief Finance Officer (DCFO)
- Estates Lead
- ICT Lead

A separate record should be established to record the names of the companies submitting tenders and the amount tendered. This record must be signed by all those present at the tender opening.

All tender documentation should be scanned and recorded for future reference.

17. TENDER EVALUATION AND CONTRACT AWARD

For **Low Value or Medium Value** tenders and where written quotations are received, the contract will be awarded to the supplier that provides the best overall value in terms of price, service and quality of work/goods.

For **High Value** (Price and Quality), **High Value and Upper Threshold** procurements, a more complex assessment of the mix of price factors and non-price factors should be considered. The evaluation approach requires the use of evaluation criteria which:

- are pre-determined and listed in the invitation to tender
- are strictly followed at all stages through the process
- include price, value, service, installation and post contract support
- are relevant and proportionate to the subject matter of the contract

18. AUDIT TRAIL

The Trust's Accounting Officer must include a DfE value for money statement within the annual statutory accounts.

A clear audit trail should be kept for all purchases. The level of detail required will increase with the value of the procurement. The procurement spreadsheet record should include:

1. who was responsible for making the decision to procure, and details of their decision-making process
2. minutes of any meetings at which the procurement was discussed (if applicable)
3. who was responsible for evaluation of tenders, and details of the evaluation (if applicable)
4. details of the dialogue or negotiation stage, and the selection process (if applicable)
5. details of the purchase itself, for example, what was purchased, from whom and for what price
6. who was responsible for receiving and checking the goods or services and for authorising and making payment. Note that in all cases the person responsible for the decision to procure must not be the same person who authorises payment.

19. INABILITY TO OBTAIN 3 X QUOTES

In the event the goods or services are exclusively available from only one or two suppliers or 3 suppliers have declined/failed to submit a competitive quote, this should be documented on the procurement spreadsheet.

Should less than 3 quotations be returned, evidence of Value for Money (VfM) must be provided before acceptance. The contract will be awarded to the supplier that provides the best overall value in terms of price, service and quality of work/goods.

A purchase order **must** be raised in IRIS financials and be approved by an authorised member of staff and within the limits contained within the financial scheme of delegation.

20. PROCUREMENT ACT 2023 (EFFECTIVE 24TH FEBRUARY 2025)

The Procurement Act 2023 came into force on 24th February 2025.

The Act aims to streamline procurement processes, enhance transparency, and provide greater opportunities for small and medium-sized enterprises (SMEs), start-ups, and social enterprises to engage with public sector contracts.

Under the Procurement Act 2023, the publication requirements for Contract Award Notices and Contract Details Notices depend on the type and value of the contract.

In summary:

Contract Award Notices (Section 50)

When to Publish:

1. A Contract Award Notice must be published before awarding the contract to notify the market of the decision.
2. This starts the mandatory standstill period (8 working days) before the contract can be signed.

Exceptions:

Not required for:

1. Light-touch contracts
2. Call-offs under a framework.
3. Contracts awarded under a Dynamic Market (DM).

Contract Details Notices (Section 53)

When to Publish:

- A Contract Details Notice must be published after the contract is signed within:
 - 30 days for standard contracts.
 - 120 days for light-touch contracts.
- If the contract is above £5 million, a copy of the contract must be published within:
 - 90 days (standard contracts).
 - 180 days (light-touch contracts).

Exceptions:

- Redactions are allowed to protect commercially sensitive or personal data (Section 94).

Key Considerations for Compliance:

- ✓ Ensure redactions are reviewed before publication (e.g., financial details, personal data).
- ✓ Monitor contracts above £5 million to ensure the contract itself is published.
- ✓ Plan for the standstill period after publishing the Contract Award Notice to allow for potential challenges.

Key Objectives of the Procurement Act 2023:

- **Simplification of Procurement Processes:** The Act seeks to reduce bureaucratic hurdles, making it easier for businesses of all sizes to participate in public procurement.
- **Enhanced Transparency:** By removing over 350 EU rules, the Act emphasizes value for money and aims to increase transparency in government tenders.
- **Support for SMEs and Social Enterprises:** The legislation encourages public buyers to engage more with SMEs and eliminates barriers like pre-award insurance costs, aiming to boost their participation in public contracts.

- **'Find a Tender' Service Modernization:** The Act includes the modernization of the 'Find a Tender' service to simplify the process for businesses to access public contracts.

Thresholds that apply to sub-central contracting authorities (e.g. Local Authorities & Housing Providers) came into force on 1st of January 2024 and remains current within the new legislation.

Under the Procurement Act 2023 (effective 24th February 2025) the procurement thresholds are listed below:

Procurement Thresholds 2024 - 2026

Type of Contract	Threshold (above which notices must be published).	
Goods	£214,904	(inclusive of VAT)
Services	£214,904	(inclusive of VAT)
Works	£5,372,609	(inclusive of VAT)
Light Touch Services	£663,540	(inclusive of VAT)
Concessions	£5,372,609	(inclusive of VAT)

If a contract falls **below** these thresholds, **no award or details notice is required.**

The above thresholds are **inclusive of VAT.**

These thresholds apply to contracts that are subject to public procurement rules, and the tender notices should be published on the Find a Tender service when the contract value meets or exceeds these amounts.

If the contract value is below the threshold, public sector buyers do not need to use FTS, but may still be required to follow other procedures for advertising tenders.

Note: These thresholds may change, so it's important to verify the current values on official government websites.

For auditing purposes, all contracts and associated business cases must be uploaded to the approved Contract Administration Software, 'Every' for future reference.

For Medium Value transactions, copies of quotations and any relevant assessment documentation must also be uploaded to the approved Contract Administration Software, 'Every'.

For High Value and Upper Threshold transactions, tender documents, tender assessments and any relevant meeting minutes must also be uploaded to the approved Contract Administration Software, 'Every'.

21. OTHER REFERENCE DOCUMENTS

- This policy should be read in conjunction with the following other Trust policies and documents:

- Financial Procedures Manual/Finance Policy
- Scheme of Financial Delegation within the Financial Procedures Manual/Finance Policy
- Modern Slavery policy and statement

APPENDIX 1

Examples of 'light touch services' for schools and Multi Academy Trusts:

Under the Light Touch Services Procurement Act 2023, schools and multi-academy trusts (MATs) can apply simplified procurement procedures to certain types of services. These services are generally lower-risk and often non-complex, allowing for a more flexible and efficient procurement process. Here are some examples of light touch services that may apply to schools or MATs:

1. Specialized Educational Services

- **Learning support services:** Hiring external educational specialists to support students with additional needs, such as special education needs (SEN) teachers, speech therapists, or occupational therapists.
- **Tutoring services:** Outsourcing services for additional academic tutoring or catch-up programs, especially in subjects like maths, English, or science.

2. Training and Development for Staff

- **Teacher training programs:** Engaging third-party providers to offer professional development, leadership courses, or subject-specific workshops for teaching staff.
- **CPD (Continuous Professional Development):** Hiring consultants or agencies to provide tailored in-service training, workshops, or certification courses for school leaders and staff.

3. Catering and Food Services

- **School meal provision:** Procurement of catering services for school lunches, especially where schools opt for local suppliers or have flexibility to choose based on service quality and cost, without needing to follow full procurement rules.
- **Healthy snack vendors:** Partnering with external companies to provide healthy snack or food options for students in line with school policy on nutrition.

4. IT and Educational Technology

- **E-learning platform subscriptions:** Contracting external providers for digital learning tools, online learning platforms, or software applications (e.g., learning management systems, virtual classrooms).
- **Hardware supply and maintenance:** Procuring devices like tablets, laptops, or projectors for educational use, along with necessary tech support or repair services.

5. Extracurricular and Enrichment Programs

- **Sports coaching services:** Engaging third-party coaches or sports organizations to run after-school sports clubs or specialized coaching sessions.
- **Music or arts enrichment programs:** Hiring external music teachers, drama instructors, or art specialists to provide extracurricular lessons and activities for students.

6. Cleaning and Maintenance Services

- **Regular cleaning services:** Schools may contract out cleaning services to maintain classrooms, toilets, and common areas, which can fall under light touch procurement if the contract value is within the thresholds.
- **Grounds maintenance:** Engaging landscaping or grounds maintenance companies for school gardens, playgrounds, or sports fields.

7. Transport Services

- **Transport for school trips:** Schools may contract private companies for buses, minibuses, or coaches for field trips or transportation to sporting events.

- **School-run services for students:** Providing transport solutions for students traveling to and from school, particularly in rural areas where public transport is less frequent.

8. Consultancy and Advisory Services

- **School improvement consultants:** Schools or MATs might contract external education consultants to offer advice on school improvement strategies or curriculum development.
- **Safeguarding training or policies:** Schools can engage external experts to review or develop their safeguarding policies or provide staff training on child protection and safety protocols.

9. Health and Wellbeing Services

- **Counselling and mental health support:** Schools could engage external counselling services or mental health professionals to support students' wellbeing.
 - **First aid or health screening:** Partnering with external companies to offer basic health services, such as vision or hearing tests, vaccination clinics, or first-aid training for staff.
-

Why do these services qualify for Light Touch Procurement:

- These services are often lower-risk, non-technical, and specialised in nature, where the focus is on quality and suitability rather than complex legal or commercial requirements.
- The simplified process helps schools or MATs focus more on getting the right service quickly and efficiently, while still ensuring value for money.
- They tend to fall below the higher procurement thresholds, making them eligible for the more flexible rules under the Light Touch Regime.

Examples of 'works' for schools and Multi Academy Trusts:

Under the **Procurement Act 2023**, "works" for **Multi-Academy Trusts (MATs)** generally refer to construction, renovation, maintenance, or improvement projects related to school buildings, facilities, and infrastructure that MATs manage or operate. Multi-Academy Trusts are groups of schools operating under a single trust, and they are responsible for maintaining and developing their properties and facilities:

Types of "Works" for Multi-Academy Trusts:

1. **Construction and Building Works:**
 - The construction of new school buildings or facilities for new academies within the trust.
 - Building extensions to existing schools or academies to accommodate growing student numbers or additional facilities such as classrooms, gyms, or dining areas.
2. **Renovation and Refurbishment:**
 - Renovating old or outdated school buildings to meet current standards and to improve safety, accessibility, and energy efficiency.
 - Refurbishing classrooms, administrative offices, and other spaces to ensure they meet the needs of modern education.
3. **Infrastructure Projects:**
 - Upgrading or improving external infrastructure, such as playgrounds, sports fields, car parks, and access roads.

- Installation of energy-efficient systems (e.g., solar panels, energy-saving lighting) or sustainability-focused infrastructure (rainwater harvesting, green roofs).
4. **Maintenance Works:**
 - Regular maintenance to ensure that school buildings and facilities remain in good condition. This includes repairs to roofing, electrical systems, plumbing, heating, ventilation, and air conditioning (HVAC).
 - Emergency repairs that may arise due to unforeseen issues like structural damage or system breakdowns.
 5. **Health and Safety Improvements:**
 - Installing safety systems, including fire alarms, security cameras, and emergency exits.
 - Upgrading facilities to comply with health and safety regulations, including accessibility features for students with special needs or disabilities.
 6. **IT and Digital Infrastructure:**
 - Works related to the installation or upgrade of digital infrastructure, such as wiring, server rooms, and networking equipment.
 - Setting up and maintaining IT systems in classrooms, such as interactive whiteboards, digital projectors, and other technology used in teaching.
 7. **Landscaping and External Works:**
 - Landscaping and improvement of outdoor areas, such as playgrounds, sports fields, and environmental areas that enhance student well-being and engagement.
 - Works on external pathways, entrances, and access points to improve accessibility and safety for students and staff.

Procurement Process for MATs under the Procurement Act 2023:

1. **Tendering:**
 - MATs must follow a competitive tendering process for awarding contracts related to works. This includes advertising opportunities, evaluating bids, and ensuring transparency in the selection process.
2. **Value for Money and Accountability:**
 - The Procurement Act 2023 mandates that MATs ensure value for money, efficient use of public funds, and compliance with procurement rules in awarding contracts for works.
3. **Standards and Compliance:**
 - MATs must adhere to specific standards and regulations in the execution of works. These may relate to building codes, environmental regulations, and safeguarding measures.
4. **Monitoring and Reporting:**
 - MATs are required to monitor the progress and quality of the works throughout the project. This includes ensuring contractors meet deadlines, stay within budget, and comply with contractual obligations.
5. **Collaboration with Local Authorities:**
 - In some cases, MATs may need to collaborate with local authorities for certain types of works, especially if the projects involve shared public resources or community benefits.

Special Considerations for MATs:

- **Funding and Budgeting:** MATs must manage funding allocated for works, which may come from government grants, loans, or their own funds. Ensuring that projects are within budget is crucial for maintaining financial sustainability.
- **Stakeholder Engagement:** MATs must engage with key stakeholders, such as parents, staff, and the local community, especially if the works impact the day-to-day running of the schools.
- **Long-Term Planning:** MATs must plan for long-term needs, ensuring that works support the future growth and educational goals of the trust.

In conclusion, **works** under the **Procurement Act 2023** for **Multi-Academy Trusts (MATs)** include all construction, renovation, maintenance, and infrastructure improvements needed to ensure that their schools provide safe, functional, and modern learning environments. MATs must follow a regulated procurement process to ensure transparency, accountability, and value for money in these works projects.