Procurement and Competitive Tendering Policy

Owned by:	Amy Taylor, Chief Finance & Operations Officer
Approved by:	Finance and Resources Committee
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Version History

Version	Approved By	Revision Date	Description of Change	Author
1.0	Finance & Resources		New policy	Amy Taylor

1. Legislation and guidance

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

The Trust is obliged to comply with the Academy Trust Handbook ("the ATH"), Funding Agreements with the Department for Education ("DfE"), and DfE guidance including "Effective Buying for your School" and the Procurement Act 2023 ("the Regulations"). Under our Funding Agreements and as a charity, the Trust's Board of Trustees have specific obligations to ensure value for money.

It is important to note that the Trust is the sole legal entity which can enter into contracts for itself and any of its academies. The academies themselves are not separate legal entities and any contracts awarded by individual academies will be binding on the Trust.

This policy is mandatory and applies to everybody in the Trust and at its academies who are responsible for purchasing, whether as an employee or contractor.

2. Principles

This policy applies to any contract for services, supplies or works which results in payment being made by the Trust (including by one of its academies). The key principles of this policy include:

Value for money – the basic principle is that procurement should deliver value for money to the Trust. The Trust wants to always achieve the best value for money from all purchases. 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.

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.

Sustainability – sustainable procurement takes a wide 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 relationships with suppliers, including contract negotiation. The Trust has a duty to lookout for signs of unacceptable practices in the supply chain such as fraud, corruption, environmentally damaging practices, modern-day slavery (see below), human trafficking and wider issues such as child labour.

Ethical procurement – 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.

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.

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 Chief Financial Officer ("CFOO"). Trusts should seek advice from their professional advisers and/or external auditors if they are in doubt over whether a lease involves borrowing.

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 Trusts 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 Whistleblowing Policy for additional guidance.

Dealing with conflicts of interest – the ATH 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. In undertaking any procurement process for the Trust, the following must be considered:

- Any interest which may affect the outcome of a procurement process must be declared. This includes Members, Trustees and Local Governors as well as members of the Trust Executive Leadership Team, Academy Senior Leadership Teams, finance team or budget holders.
- A record of all such declared conflicts of interest must be sent to the CFOO 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 kept 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 ICT equipment. You must inform the CFOO immediately on becoming aware of any such gifts or hospitality. Staff must make themselves aware of the Trusts policy on Gifts and Hospitality (which is included within the Code of Conduct) and ensure it is always complied with.

Accountability and record keeping – the Trust is accountable for its expenditure and the conduct of its affairs. As such, it is essential that the following points are adhered to:

- Documented procurement and authorisation must be obtained prior to ordering (and payment) in accordance with this policy and the Trust Scheme of Financial Delegation.
- Orders should be raised using the Trust-approved online ordering process (currently Microsoft Navision). The CFOO maintains a list of 'allowable exceptions' to using the approved online ordering process (refer to the Appendix for details).
- All suppliers must be checked and verified in advance by the Trust 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 and saved in the relevant electronic file.

3. Who can buy?

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 Scheme of Financial Delegation.

It is important to remember that any procurement with a value of £500,000 of more requires specific approval from the Trust Board (or their delegated Committee/Chair).

4. 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 Executive Leadership Team may request aspects of the policy are waived. Exceptional circumstances may include, but are not limited to:

- Disaster recovery and the period 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 the CFOO and the Chief Executive Officer (under £500,000 in value) or the Trust Board (over £500,000 in value), via e-mail if necessary.

5. Pre-purchase checklist

a) Check if the purchase is actually required. Can goods or services be found from within the Trust that would meet the need.
b) Does the purchase align with the Academy/Trust Development Plan?
c) Check the value of the planned procurement and the appropriate procurement rules (see below).
d) Liaise with the Trust Procurement Partner to establish whether any other academy or departments in the Trust need to make the same or similar purchase. If so, the spend should be included within the same contract.
e) Consider how the purchase is going to be sourced. Ideally, can the Trust use an existing framework agreement, or can another school provide the requirement? Does a preferred supplier exist for Low Value transactions?
f) Has funding been identified to pay for the transaction? If budget does not exist, is a virement required?
g) Is the proposed purchase in line with specific funding criteria (e.g. Pupil Premium, Sports Premium)?
h) As a minimum requirement, for every purchase 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.

6. Frameworks

In accordance with the ATH and DfE guidance, wherever possible, the Trust should seek to use an existing framework arrangement. The benefits of frameworks are that they have already been through a competitive tender 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.

Examples of existing procurement frameworks include those set up by Crown Commercial Services, Eastern Shires Purchasing Organisation, Crescent Purchasing Consortium, Schools Buying Club and Yorkshire Purchasing Organisation and cover a wide range of areas.

In each case, it is important that:

- The Trust is entitled to call off from the arrangement – this needs to be checked in each case;
- The specification and the contract terms are suitable for the particular needs of the procurement. The terms and conditions for frameworks are generally set in advance and cannot be changed beyond the mechanism set out in the framework;
- The framework's guidance must be followed, particularly about how orders should be place.

7. Extending or varying existing contracts

It may be necessary to consider extending an existing contract or using an existing Trust contract for additional spend. The Trust Procurement Partner must be contacted before agreeing to any such extension or variation, they will advise on the necessary course of action.

A requisition must also be raised following standard purchasing procedures and any approved extension recorded in the Trust contract register.

Existing contracts should be presented to the Finance and Resources Committee as part of the annual budget setting process.

Contract extensions or variations (planned and actual) relating to contracts over £500,000 in total value must be reported to the Finance and Resources Committee on a regular basis.

8. Scheme of Financial Delegation

Different rules apply depending on the value of the purchase being made. The Trust's current spending thresholds are set out below and in the associated Scheme of Financial Delegation:

Threshold	**Procurement Category**	**Authority to Approve**
Up to £10,000	Low value	<u>Primary:</u> Up to £1,000 – Budget holder Up to £5,000 – Principal £5,001 to £10,000 – Principal plus one of Head of Finance/Director of IT/Director of Estates as appropriate* <u>Secondary:</u> Up to £1,000 – Budget holder Up to £10,000 – Principal <u>Trust Centre:</u> Up to £1,000 – Budget holder Up to £10,000 – One of Head of Finance/Director of IT/Director of Estates as appropriate

£10,001 – Public Procurement Threshold (currently £207,720 incl. of VAT or £173,100 excl. VAT)	Medium value	<u>Academies:</u> £10,001 to £100,000 – Principal plus one of Head of Finance/Director of Strategic IT/Director of Estates as appropriate <u>Trust Centre:</u> £10,001 to £100,000 – One of Head of Finance/Director of Strategic IT/Director of Estates as appropriate* plus CFOO <u>All:</u> £100,001 to £250,000 – as above plus CFOO
Over Public Procurement Threshold (currently £207,720 incl. of VAT or £173,100 excl. VAT)	High value	<u>All:</u> £100,001 to £250,000 – as above plus CFOO £250,001 - £500,000 – as above plus Chief Executive Officer ("CEO") Over £500,000 - As above plus Trust Board (or delegated Committee/Chair)

Where a supplier is not VAT registered (and no VAT is included on their quote/invoice) the excl. VAT limits must be applied.

The CFOO 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 category 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 below) and/or a request for funding from alternative sources or Trust reserves.

Any new request for funding from Trust reserves must be pre-approved by the Trust Board, in line with the Trust Reserves Policy.

9. Virement/variation of funds

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

Approval for the virement of funds must be submitted to the CFOO for review, preferably in writing, in advance.

Where insufficient approved budget exists to fund a transaction and virement has not been approved, the CFOO reserves the right to reject the order.

Budget virement thresholds are set out in the Trust's Financial Scheme of Delegation:

Virement Threshold	**Authority to Approve**
<u>Primary:</u> Up to £5,000 <u>Secondary:</u> Up to £10,000	Principal (in consultation with their Finance Partner and the CFOO)
Up to £50,000	CFOO
Up to £100,000	Both CFOO and CEO
Over £100,000	As above plus Trust Board (or delegated Committee/Chair)

10. Valuing your procurement

It is important that any procurement is properly assessed for value. Contracts must not deliberately be divided into smaller contracts to avoid the procurement rules. Similarly, the value of a planned purchase should not be artificially reduced to avoid the procurement rules.

The contract value must be based on the total expected spend over the full term of the contract, including any options to extend or renew. This value must be calculated inclusive of VAT, in accordance with the Procurement Act 2023. Where appropriate, similar requirements across all Trust schools should be aggregated to determine the overall contract value, ensuring compliance with applicable thresholds.

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 spend and multiplying it by the estimated duration of the contract (including any known extensions or options to renew).

You should contact the Trust Procurement Partner if you are unsure about how to calculate contract value.

11. Low value transactions (up to £10,000)

For all transactions with a total value of less than or equal to £10,000 (exclusive of VAT), competitive quotes are not needed but Value for Money ("VfM") checks must be undertaken before a purchase order is issued.

When liaising with suppliers, our Trust terms and conditions of the purchase will be automatically attached to our purchase order, they are also available on our Trust website. The Trust standard terms and conditions should be always used, unless agreed in advance with the CFOO.

Confirmation must always be obtained that 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 available, virement of funds may be considered (see section 9, above).

All approved suppliers of the Trust should be made aware that they should not provide goods and services to any school within our Trust without a formal purchase order.

Preferred Suppliers
From time to time the Trust Finance Team (via the Head of Finance) may confer preferred supplier status on an existing supplier for low value transactions. Preferred supplier status will be based on a range of factors including provision of reliable, consistent service and delivery of low-cost, good-value products. Preferred supplier status is reviewed on a regular basis (at a minimum, annually).

Budget holders should consult with the Trust Finance Team to check, before ordering, if a relevant preferred supplier exists in the Trust finance system. If not, the budget holder is responsible for identifying an appropriate supplier and ensuring they are set up as a supplier in accordance with the Trust purchasing processes.

12. Medium value transactions (£10,001 to Public Procurement Threshold)

The Public Procurement Threshold is currently £207,720 inclusive of VAT (£173,100 exclusive of VAT).

When making medium value purchases without a framework agreement, the Trust will use the ***overall best value approach***. This requires at least three written quotations to be obtained before a purchase order is approved and issued to the supplier. This can be reduced to two written quotations where the total order value is less than £25,000.

Using this approach, you must:

- Provide a specification of the purchase in advance for each supplier identified to provide a quote. This specification must include, as a minimum: a description of the requirement, quantity needed, and timescale for provision or completion, deadline for submission of quotation.
- Complete the 'Medium value transactions – Short tender record form' template (see appendix A) once the quotations are obtained, ensuring that a recommendation for award is given which clearly explains the rationale for that award considering all relevant factors including price, quality, and availability.

Should less than three quotations be returned (or two quotations where the total order value is less than £25,000), evidence of VfM must be provided before acceptance and approval.

13. High value transactions (over the Public Procurement Threshold)

Prior to undertaking any high value purchases, a detailed business case for the spend must be prepared. This should be prepared in consultation with the Trust Procurement Partner who will need to advise throughout the process.

The business case must include, as a minimum:

- The expected impact on pupil outcomes where it is a curriculum spend with reference to the Academy Development Plan;
- Where the expenditure relates to administrative costs evidence that the Trust/academy is required to incur such costs and attempts to minimise the expenditure has been considered;
- Confirmation that 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 9) and/or a request for funding from alternative sources;
- Notes on discussions held with the Trust Procurement Partner, CFOO/Trust Finance Partner and relevant Director of Education which document:
  - Consideration that the purchase of the goods or service will not result in any cash flow issues for the academy/Trust.
  - Consideration of the method of procurement to be used.

When undertaking high value purchases, the use of an approved framework should always be considered. Specialist procurement support from an external consultant should also be considered if the procurement is of a specialist nature. This should be considered in consultation with the Trust Procurement Partner.

As explained in section 6, the use of an approved framework means that the competitive tendering element has already been undertaken. Using the framework is likely to require a tender pack to be compiled and submitted to all potential bidders. This tender pack will be bespoke to each case but could include, for example:

- Detailed specification of the product or service required;
- Details of pricing, method statements and/or product characteristics;
- Evaluation criteria which will be used to evaluate the tenders received (including disclosure of the

criteria, sub criteria and weightings that will be applied to select the preferred bidder);
- Draft set of terms and conditions.

Where an approved framework is not used, a full tender process must be followed:

1) Create a specification.
2) Assess the market – prepare for the tendering process by developing our knowledge of the market. We will find out how many suppliers are available and the best way to advertise our contract to a range of suppliers.
3) Develop a contract – a contract will include terms and conditions, service levels expected, a contract management plan and an exit strategy. The Trust standard terms and conditions should be always used, unless agreed in advance with the CFOO.
4) Reduce the number of bids – to reduce the number of bids the trust needs to evaluate, we will either use an expression of interest process to gauge interest in the contract or a pre- qualification questionnaire.
5) Establish how quotes will be assessed – set out criteria that will allow evaluation of how the suppliers' bids best meet the requirements in the specification, and establishing the most economically advantageous tender that best combines cost and quality.
6) Create a timeline for the tender process – this will include the dates of the clarification period, the deadline for submitting tenders and the date we expect to award the contract.
7) Prepare an invitation to tender. This will include:
    - A covering letter with a timeline for the process
    - Instructions on how suppliers can ask clarification questions and submit their tender
    - The specification
    - A pricing schedule
    - The contract's terms and conditions
    - Contract management requirements (see 'develop a contract' above)
    - Award criteria, including the scoring system and any weightings
    - If appropriate, an invitation for suppliers to give a practical demonstration of their goods, works or services.
8) Advertise the contract where suppliers are likely to look, such as:
    - The Find a Tender service, the central digital procurement platform (as mandated by the Procurement Act 2023)
    - The Government's Contract Finder service
    - The Trust's website
    - Trade magazines
    - Local and national newspapers.
9) Run the tender process and provide clarifications.
10) Evaluate tender responses – at least two people will independently score and evaluate each bid and then compare notes after completing their evaluations; records of decision making and moderation decisions will be kept.
11) Notify suppliers of the award decision and intention to award the contract, in accordance with the applicable standstill period requirement, and publish a UK6 (Contract Award Notice) on the Find a Tender service.
12) Following completion of the standstill period, finalise and enter into the contract. Where

applicable, publish a UK7 (Contract Details Notice) on the Find a Tender service and, where relevant, on Contracts Finders

13) Order acknowledgement – ensure that all order acknowledgements are against the Trust's standard terms and conditions rather than acknowledging against the supplier's precedent terms and conditions.
14) Abandoning the tender process – on very rare occasions we may need to halt the tender process. Should this occur, we will notify suppliers who are preparing their bids as soon as possible.

Contracts not caught by the Regulations

Some contracts, regardless of their value, are not subject to the Regulations. This includes, for example, employment contracts.

Some types of arrangements may be covered by other rules, for example, if the arrangement is a contract where the income is being collected directly by the provider. This is known as a "concession" contract.

This is a complex area, and you should check with the Trust Procurement Partner/CFOO if you are unsure.

14. Rules on opening tenders

Every quotation for a high value procurement may be provided in hard copy or via email to a Trust email address.

The Trust (or academy) must keep tenders secure until the time specified for all tenders to be opened.

All tenders submitted should be opened at the same time and the tender details should be recorded. A minimum of two people should be present for the opening of tenders from the list below:

- Chief Executive Officer (CEO)
- Chief Financial Officer (CFOO)
- Trust Procurement Partner
- Senior Head of Operations
- Head of Finance
- Director of Estates (if spend relates to estates or capital projects)
- Director of Strategic IT and Infrastructure (if spend relates to ICT contracts or supplies)
- Principal/Headteacher.

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 retained electronically within SharePoint, for future reference.

15. Tender evaluation and contract award

For low value and medium value procurement, 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 procurement, 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
- Are relevant and proportionate to the subject matter of the contract
- Are capable of objective assessment
- Are weighted in accordance with the relative importance and weighting of the tenders
- Avoid discrimination based on bidder's nationality or other discriminatory measures.

Where the approach set out above is used, any contract must be awarded to the bidder which achieves the highest score in the objective evaluation.

Notification of Unsuccessful Bidders

In accordance with the Procurement Act 2023, all unsuccessful bidders must be notified in writing at the same time as the successful bidder. The notification must include specific details including:

- The award criteria;
- the scores of both the successful and unsuccessful bidders;
- The reasons the bid was not selected; and
- Details of the standstill period.

A standstill period of at least 8 working days must be observed before final contract signature to allow for any challenges.

Audit trail

The Trust's Accounting Officer must include a Value for Money statement within the annual statutory accounts.

In order to be able to do this, a clear audit trail should be kept for all purchases. The level of detail required will increase with the value of the procurement. The written record should include:

- Who was responsible for making the decision to procure, and details of their decision-making process
- Minutes of any meetings at which the procurement was discussed (if applicable)
- Who was responsible for evaluation of tenders, and details of the evaluation (if applicable)
- Details of the dialogue or negotiation stage, and the selection process (if applicable)
- Details of the purchase itself, for example, what was purchased, from whom and for what price
- 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.

For auditing purposes, all contracts and documentation must be saved in the relevant SharePoint folder.

For Medium value transactions, copies of quotations and any relevant assessment documentation should be retained and attached to the formal purchase order raised on the Trust's finance system.

For High value transactions, tender documents, tender assessments and any relevant meeting minutes must also be retained. A written report should also be kept (except for where framework agreement call offs have been used). This should include:

- The name and address of the Trust
- The subject matter
- The value of the contract.

And where relevant:

- Details as to how bidders have been shortlisted or selected to tender, including: the successful and unsuccessful bidder names; the reasons for the deselection/selection and whether any tender was found to be abnormally low;
- The name of the successful tenderer and the reasons why its tender was selected;
- The share (if any) of the contract or framework agreement which the successful tenderer intends to subcontract to third parties, and the names of the main contractor's subcontractors (if any);
- The justification for using a particular procurement procedure (where needed); where applicable, the reasons why the Trust decided not to award a contract;
- Where applicable, the reasons why means of communication other than electronic means have been used for the submission of tenders; and,
- Where applicable, if conflicts of interests were detected and the subsequent measures taken.

Additional transparency obligations under the Procurement Act 2023 include publishing contract award notices, contract change notices, and transparency notices on the designated central platform.

16. Other reference documents

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

- Finance Policy
- Scheme of Financial Delegation
- Conflict of Interest Policy (contained in the Code of Conduct)
- Gifts and Hospitality Policy (contained in the Code of Conduct)
- Whistleblowing Policy
- Standard Terms and Conditions for the Purchase of Goods and Services
- Risk Management Strategy.

Appendix A

Medium Value Transactions
Short Tender Record Form

A medium value transaction is defined as any order for goods and services with a total expected value (over the life of the project or contract) of £10,001 – Public Procurement Threshold (currently £207,720 inclusive of VAT or £173,100 excluding VAT).

In line with the Trust Procurement and Competitive Tendering Policy, where an approved framework is not utilised, a short tender process must be carried out. Please use this form to document that short tender process. This form should them be retained with the project procurement documentation and uploaded to the finance system as part of the PO approval process.

Approval requirements for this short tender process are set out in the Trust Scheme of Delegation as follows:

- £10,001 - £100,000: Budget Holder, Principal plus Head of Finance/Director of Estates/Director of Strategic ICT and Infrastructure (as appropriate)
- £100,001 - £250,000: As above plus CFOO.

Note that approval from the CFOO is required for all medium value transactions from the Centre budget.

Project/contract name:
Please document your business case/rationale for this spend a) Curriculum spend: expected impact on pupil outcomes with reference to Academy Development Plan; b) Admin spend: evidence that the spend is required and considerations for minimising expenditure

Please confirm a detailed specification has been developed, reviewed and agreed be appropriately experienced persons and will be distributed to those being asked to tender (attach a copy where possible/applicable)
Details of (at least) three comparative quotes obtained, against detailed specification. Include company name and total value of quote (net of VAT). Note that if the procurement is expected to be worth less than £25,000, two comparative quotes will suffice: 1) 2) 3)   Ensure quotes are retained and attached.
Recommendation: *Your recommendation must include a detailed justification, particularly if your recommendation is not the lowest price quote. Your recommendation must consider all elements of value for money including price, quality, availability (refer to the Trust Procurement and Competitive Tendering Policy) etc.*

Prepared by: Name Role Signed Date		
Approved by (1): Name Role Signed Date	***Approved by (2):*** Name Role Signed Date	***Approved by (3):*** Name Role Signed Date