

Lady Katherine Leveson  
Church of England Primary School



Purchasing Policy

*Responsibility of: School Bursar*

*Evaluation:                      Governors Finance Committee,  
Annually, Spring Term*

*Lady Katherine Leveson Church of England Primary School*  
*Policy for Purchasing*

*Overview:*

*Executive Summary*

*Purpose:* To ensure best value for money is obtained;  
To ensure clear, appropriate and efficient controls and processes are in place;  
To ensure that all Staff and Governors understand their responsibilities.

*Rationale:* To aid the Governors' Finance Committee in monitoring purchasing arrangements

*Key Principles*

The underlying principle with regard to purchasing is obtaining the best value for money. Consideration should be given to price, quality and fitness for purpose.

All staff are responsible for the efficient use and procurement of materials and resources.

**Any staff ordering items must:**

- Follow procedures to ensure value for money is obtained and record this information as required.
- Raise an official order of items to be purchased before they are ordered so that authorisation is given.

Official order forms are to be signed by the Headteacher or delegated Officer.

<b>Authority Limit</b>	<b>Authority to approve expenditure</b>	<b>Authority to sign order</b>
Below £2,500	Headteacher (within limits of authorised budget, headings, otherwise Finance Committee)	Headteacher
£2,500 - £10,000	Finance Committee	Headteacher
Over £10,000	Governing Body	Headteacher

**Quotes and Tendering**

Quick Reference Guide Table (from Schools Rules for Contracts):

£60,000+	Competitive tenders required. Contract must be signed by Corporate Procurement Manager or authorised deputy.
£10,000 - £59,999	Competitive quotations required. Contract on official order form or standard form of contract.

Below £1,000	No need for competitive quotations, but must either use corporate contracts where one exists or show value for money. Use official order form.
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NB Any requirement over £10,000	Use (a) corporate contract where one exists unless there is good reason not to; or (b) refer the requirement to Corporate Procurement Service  <i>The Authority's Procurement Team is responsible for maintaining a register of contracts and they should be informed of any contracts above £10,000 that the School enters into.</i>
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**Contracts estimated to be less than £10,000:**

Advice should be sought from the Bursar / Finance Manager when ordering supplies of basic materials as the Authority has negotiated contracts for commonly used items and they are usually subject to discount. Further details can be obtained from the Corporate Procurement Team. Where schools use an existing corporate contract, or use the Council to procure goods and services, the Council will take the responsibility for demonstrating best value.

*Staff must satisfy themselves that best value has been achieved. To show this they can obtain written quotations or use the proforma for recording verbal quotations attached to these procedures.*

*The Governing Body may authorise a supplier other than the lowest price if it so chooses, or may authorise a purchase if no alternative quotations are available. This process can be built into the Policy and evidence recorded in the minutes where governors have given approval in support of purchasing decisions.*

*The school tests the market every one to two years for regular non-contract suppliers to ensure that they remain competitive. The information is provided to governors and expenditure re-approved.*

***Lease or rental agreements should be referred to the Authority's Procurement Team before being accepted. Contracts often extend over a number of years and it is important that there are no unfavourable terms that may adversely affect the School's finances.***

**5. Authority to Pay**

- Delivery notes must be checked against invoices and orders to confirm all items have been received and prices are correct. The receiver should sign as confirmation of their check. If a delivery note is not received, evidence of the check can be recorded on the invoice. ***NB. The checker should be a different member of staff to the person authorising the invoice to ensure that separation of duties is maintained;***
- The Headteacher will authorise all invoice batches to confirm payments to be made. In the absence of the Headteacher the Deputy assumes the Headteacher's authority limits.

*School Self Evaluation:* This policy shall be reviewed, in line with any FMSIS recommendations, annually, in the Spring Term, by Governors' Finance Committee

**PRO-FORMA FOR RECORDING QUOTATIONS**

<b>PURCHASE</b>		
<b>MEMBER OF STAFF:</b>		
<b>BUDGET:</b>		
<b>COMPANY CONTACTED</b>		
<b>PERSON SPOKEN TO:</b>		
<b>DATE AND TIME:</b>		
<b>QUOTATION:</b>		
<b>OTHER DETAILS:</b>		
<b>REASONS FOR CHOICE OF SUPPLIER</b>		