



**Cherry Tree Trust**

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## Procurement Policy

<b>Document Control</b>	
Title:	Procurement Policy
Date:	November 2025
Supersedes:	competitive tendering policy
Amendments:	<b>Clearer structure merging procurement and competitive tendering requirements</b> <b>Updated financial thresholds and procedures</b> <b>Introduction of a defined process for direct awards</b> <b>Strengthened governance, record-keeping and conflict-of-interest controls</b>
Related Policies / Guidance:	full alignment with current DfE, ESFA and public procurement requirements
Review:	Annually

**Approved by:**

**Date:**

**Last reviewed on:** December 2025

**Next review due by:** December 2026

## **1. Purpose and Scope**

This policy sets out how The Cherry Tree Trust (Newall Green Primary School) will procure goods, services, and works in a way that is transparent, fair, and provides value for money.

It ensures that:

- Trust funds are used lawfully, in line with Articles of Association, Funding Agreement, and the Academies Financial Handbook.
- Spending is conducted in a way that commands broad public support.
- Trustees meet their responsibilities as charitable trustees and company directors.
- Conflicts of interest are managed appropriately.
- Competitive tendering, where required, is carried out in line with legislation and best practice.

Note: Competitive tendering is a part of the overall procurement process and applies to contracts above specific thresholds. This policy covers all procurement activity, including purchases below these thresholds, use of frameworks, direct awards, and emergency spending.

## **2. Legislation and Guidance**

This policy aligns with:

- Academies Financial Handbook (2025)
- DfE guidance on buying procedures and procurement law
- Public Contracts Regulations 2015 (PCR)
- Funding Agreement and Articles of Association

Trustees must ensure that any competitive tendering activity complies with PCR thresholds and best practice for value for money.

## **3. Roles and Responsibilities**

### **3.1 Trustees**

- Ensure value for money and public accountability.
- Use professional advice where appropriate.
- Avoid conflicts of interest, excluding themselves when necessary.

### **3.2 Audit, Risk & Finance Committee**

- Oversees procurement processes, including competitive tendering.
- Reports to trustees on procurement activity.

### **3.3 Chief Financial Officer (CFO)**

- Oversees procurement governance and risk management.
- Supports and monitors all purchasing and tendering activity.
- Reports to committees and trustees as required.

## 4. Purchase Thresholds

**De Minimis:** Up to £2,000 — see Operational Procedures Manual.

**Thresholds:**

Level	Value	Delegated Authority
Low	£2,000 – £9,999	Chair of Governors
Medium	£10,000 – £75,000	Chair of AR&F Committee
High	£75,001 – PCR threshold	Chair of Board of Trustees
Over PCR threshold	Above £213,477	External/legal support
Light touch regime	Above £663,540	Legal/third-party support

Legal advice will be sought for contracts exceeding PCR thresholds.

## 5. Framework Agreements

- Frameworks are pre-tendered arrangements offering value for money.
- Selection may be by direct award (if permitted) or mini-competition.
- Decisions and reasons for framework and supplier selection will be documented.

## 6. Valuing Contracts

- Value is whole-life cost, including fees, maintenance, delivery, and disposal.
- Contract extensions are included in value.
- Splitting contracts to bypass thresholds is prohibited.

## 7. Evaluating Tenders

- Tenders will be evaluated against criteria in the tender document, including cost, quality, delivery, performance, and risk.
- Additional criteria may be applied depending on the contract.
- A scoring system (1–5) is used, and records of evaluation are retained.

## 8. Conflicts of Interest and Related Party Transactions

- Report all related-party contracts to ESFA before commencement.
- Approval is required if:
  - Individual contract > £20,000, or
  - Cumulative contracts with the party exceed £20,000 in a financial year.

## 9. Procurement Procedures

### 9.1 Low and Medium-Value Purchases

- Prepare specification
- Compare at least 3 suppliers
- Evaluate quotes using scoring criteria (1–5)
- Place order with all details recorded

### 9.2 High-Value Purchases (without a framework)

- Obtain legal advice and support

- Conduct full market assessment
- Ensure PCR compliance
- Develop specification and contract
- Pre-qualify suppliers as necessary
- Advertise where required (Contracts Finder / Find a Tender Service)
- Evaluate, award, and finalize contract

### **9.3 Direct Awards and Consultant Appointments**

Direct awards are allowed in lieu of tendering in exceptional circumstances, e.g., engaging specialist consultants, external advisors, or services where competition is impractical.

- Direct awards must comply with the trust's procurement policy.
- A written record must document:
  - Reason for direct award (eg. specialist expertise, urgency, continuity of service)
  - Service required
  - Evidence of compatibility with policy
  - Approval by Principal, CFO, or relevant committee
- Direct awards must be reported to the Finance Committee.

**Acceptable circumstances include:**

- Specialist educational consultancy
- Emergency works
- Services under an existing framework agreement permitting direct call-off

**Requirements:**

- Must comply with this procurement policy ensuring the appropriate level of approval is obtained.
- Written record of reasons, service required, and approvals recorded to maintain transparency and auditability,
- Reported to Finance Committee

### **10. Record Keeping**

- Retain all procurement records securely, in line with data protection law and for at least 6 years.

### **11. Monitoring and Review**

- CFO ensures policy implementation.
- Board of Trustees reviews and approves **annually** or when thresholds change.

### **12. Related Policies**

- Operational Procedures Manual (will reference this policy)
- Academies Financial Handbook
- Risk Management Policy
- Conflicts of Interest Paperwork – collated as Trust Business