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STEPS TO STARTING THE PROCUREMENT PROCESS

EDUCATION COMMERCIAL
SERVICES

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IDENTIFY THE NEED AND WRITE A BUSINESS CASE

What you need, why and by when. Obtain approval to proceed and record the decision, estimate costs and identify any potential collaboration.

IDENTIFY THE TEAM - WHO SHOULD BE INVOLVED?

Who do you need to involve in the end to end process?
Governing board, Directors, suppliers (pre-market engagement),
Central Purchasing Bodies (NEPO).

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IDENTIFY WHO HAS THE LEGAL AUTHORITY TO BUY

Who is actually buying? The MAT, The Diocese, the local authority, etc.
Contractual arrangements need to be with legal entity.

GET EXPERT HELP!

The Central Team, subject matter expert (SME),
project management, legal requirements, options appraisal,
specification build, Central Purchasing Body category expertise.

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CONSIDER THE 'WHOLE LIFE' COSTS

DfE guidance is 4 years if continual - price, VAT, delivery costs, ongoing
maintenance costs, running costs, removal and/or disposal. £40k = high value;
£10-40k = medium; <£10k low - above £189k OJEU process (4 years!) value.

REMEMBER WHO IS YOUR ACCOUNTING OFFICER

Remember your financial thresholds and governance rules.
< £10k, CFO 2nd approver, >£10k <£30k CFO and CEO additional
signatories, >£30k <£75k CFO review, CEO, CFO and Finance

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UNDERSTAND CONFLICTS OF INTERESTS!

Personal or professional, declaration of interests, school policy,
clear and open process, can bias or influence be proved or perceived.
Use different staff and independent people, multiple people, use moderation.

COLLABORATE!

Collaborate with other schools, educational establishments,
shared resource, expertise, knowledge and costs, go to market as a unit,
aid supplier engagement - be clear about the collaboration challenges.

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