

School Resource Management

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Introduction to Procurement

Welcome and Introduction

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- DfE SRM short courses
- Your trainer
- Entrust overview
- Aims of the session

www.educationspace.co.uk/SRM/

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Learning Outcomes

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entrust
Inspiring Futures


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Awareness of appropriate procurement regulations and how to ensure the school follows them



DfE recommended frameworks



Awareness of how to secure value for money / great outcomes from your expenditure



The Buying Cycle

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Introduction to Procurement



What is Procurement?



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“the process by which an organisation buys the products or services it needs from other organisations” – Cambridge Dictionary

Schools Buying Strategy

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Schools' buying strategy

January 2017

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Procurement Regulations



E. Value for money

18	Does the school have procedures for purchasing goods and services that both meet legal requirements and secure value for money?
19	Is the governing body given the opportunity to challenge the school's plans for replacing contracts for goods and services that are due to expire shortly?
20	Does the School consider collaboration with others, e.g. on sharing staff or joint purchasing, where that would improve value for money?
21	Do you compare your non-staff expenditure against the DfE recommended national deals to ensure you are achieving best value?

F. Protecting public money

24	Are there adequate arrangements in place to manage conflicts of interest or any related party transactions?
25	Are there adequate arrangements in place to guard against fraud and theft by staff, contractors and suppliers? (Please note any instance of fraud or theft detected in the last 12 months)

E. Value for money

32	Does the trust benchmark its income and expenditure and that of its schools annually against that of similar trusts and schools and investigate further where any category appears to be out of line?
33	Does the trust have procedures for purchasing goods and services that both meet legal requirements and secure value for money?
34	Are the trustees given the opportunity to challenge their staff's plans for replacing contracts for goods and services that are due to expire shortly?
35	Does the trust consider collaboration with others, for example on sharing staff or joint purchasing, where that would improve value for money?

F. Protecting public money

39	Does the trust regularly review its internal control arrangements to safeguard against fraud and theft, by staff, contractors, suppliers and other third parties?
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Buying Procedures & Procurement Law for Schools (DfE July 2019)

<https://www.gov.uk/guidance/buying-procedures-and-procurement-law-for-schools>

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[Home](#)

Buying procedures and procurement law for schools

[Give feedback about this page](#)

From: Department for Education

Published: 1 July 2019

Updated: 28 October 2020, [see all updates](#)

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Q

Contents

How to buy goods, works or services for your school.

Following these guides will help schools to:

- get value for money
- comply with EU procurement law

Read [buying for schools](#) for advice on the types of goods and services schools regularly buy, such as catering and ICT hardware.

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Before you Start



Before you Start

- Write a business case
- Who?
- Cost / expenditure
- Collaboration



Before you start

How to prepare and research before buying things for your school to help you get the best deal and save money.

[Open all](#) [Close all](#)

[Write a business case](#)



[Identify who should be involved](#)



[Identify who should be buying](#)



[Get expert help](#)



[Estimate the whole-life cost of the contract](#)



[Conflicts of interest](#)



[Classify expenditure correctly](#)



[Work with other schools](#)



Writing a Specification

Talk, Think,
Check

Writing a specification

How to write a specification – the document you give to suppliers explaining what you want to buy.

No matter what procurement process you use, always write a specification describing what you want to buy. It helps to make decisions later and tells suppliers exactly what you need.

It may help to write a draft to use in your business case for buying something.

Before you write it:

- talk to people who will use the thing you plan to buy – to make sure you get what they need
- talk to people who will approve the purchase
- talk to suppliers – to get an idea of prices and what's available
- think about whether you need expert help with writing your specification or the whole buying process

Your specification should include:

- a precise description of what you need
- an explanation of what it should do, if needed
- the amount you need
- what quality it should be
- when you need it

The Right Way

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Find the right way to buy

When to buy from a framework agreement, when to get bids or quotes and when to run an EU compliant buying process.

[Open all](#) [Close all](#)

 **Follow your school's procurement rules. You can get these from your school or your local authority.**

[When to buy using a framework agreement](#)



[When to get at least 3 quotes from suppliers](#)



[When to advertise a contract and run a buying process](#)



[When to run an EU compliant buying process](#)



Low to Medium Value

Buying low to medium cost things

How schools can buy low or medium value things by researching suppliers and getting at least 3 quotes.

[Open all](#) [Close all](#)

Your school's procurement policy should set the low and medium levels. We generally say:

- low is under £10,000
- medium is £10,000 to £40,000

To buy in this way you should:

- decide how you will assess the bids
- get quotes from at least 3 suppliers
- assess all the quotes you get fairly
- choose the supplier that offers best value for money

[Getting quotes](#)



[Decide how you'll assess the quotes](#)



[How to decide the winning quote](#)



[Place your order](#)



Decisions, Decisions

- Price
- Quality
- Specification
- Ability to deliver
- Best value
- Supplier

	Weighting	Company A Score	A	Company B Score	B
Price	5	3	15	5	25
Quality	3	5	15	3	9
Spec	4	3	12	5	20
Delivery	2	4	8	5	10
			50		64

High Value – Under EU Threshold

Buying high-value things under the EU procurement threshold

How schools can buy high value things, including how to advertise a contract and run a procurement process.

[Open all](#) [Close all](#)

We recommend that you get legal advice before buying high value things.

Your school's procurement rules will set the high level. As a guide, we generally say anything over £40,000 is high value.

This guide is only for buying things under the EU procurement threshold. If what you are buying is over, or near to, the [threshold](#), you need to use the [EU compliant bidding process](#).

If you cannot get what you need through our [find a DfE recommended framework](#) tool or another [framework agreement](#) you must:

- assess the market
 - prepare your contract and tender documents
 - advertise in the right places
 - consider using an expression of interest to cut the number of bids you'll need to assess later
 - send an invitation to tender to people who reply to your advert
 - fairly assess all the bids you get , using the same process
 - choose the bid that offers best value for money
 - award the contract to the highest scoring bidder
-

Over EU Procurement Threshold

You need to run this kind of process if:

- you cannot get what you need through one of our recommended deals for schools or a framework agreement
- you are buying something over the EU procurement thresholds
- The thresholds are:
 - goods – £189,330
 - works – £4,733,252
 - most services – £189,330
- Some services for education, health and care are covered by the ‘light touch regime’. The threshold for these is £663,540.
- Check the list of all the services covered by the light touch regime in [the legislation](#).
- We recommend that you get legal advice if what you are buying is over, or near to, the thresholds.

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Frameworks



When to Buy Using a Framework Agreement

Buying procedures and procurement law for schools

[Give feedback about this page](#)

From: [Department for Education](#)
Published: 1 July 2019
Updated: 28 October 2020, [see all updates](#)

Search this manual

[Contents](#) > [Select a supplier direct from a framework agreement](#)

Select a supplier direct from a framework agreement

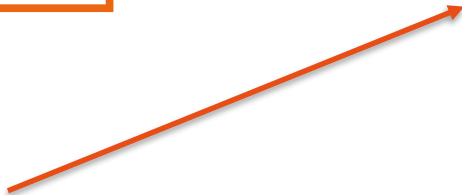
How schools can buy from a framework agreement where they're allowed to select the supplier directly.

[Find a DfE approved framework.](#)

The [framework agreement](#) will say if you're allowed to select the supplier yourself, without [running a mini-competition](#) and will set out the rules for doing so which you must follow.

The terms and conditions, or 'service order terms', are set as part of the framework agreement. You cannot usually change them.

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Finding a Framework

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Guidance

Find a DfE-approved framework for your school

Find quality-checked suppliers of goods and services for your school.

Published 1 July 2019

From: [Department for Education](#)

Applies to: England

 [Print this page](#)

This service is for school buying professionals.

It will help you to:

- find ways to buy goods or services, recommended by the Department for Education (DfE)
- get value for money
- comply with buying procedures and procurement law (OJEU)

This service replaces deals for schools.

Find a framework >

[See a list of all frameworks.](#)

Published 1 July 2019

Finding a Framework

Benefits of using a framework

You can use frameworks without having to run a full buying process.

Each framework agreement has:

- details of products, services and suppliers available
- an agreed pricing structure and terms and conditions
- guidance on how to buy

Buying from a framework can be quicker and easier than getting bids or quotes because the agreements:

- have already been through a full competitive tender process
- have been quality checked
- are checked to make sure they comply with the law
- may have draft specifications and help available

Continue

How frameworks are selected

The Schools Commercial Team (SCT) within DfE reviews a range of frameworks. These frameworks are assessed for compliance with procurement regulations, ease of use, suitability and value for money. Feedback from schools is also considered when selecting frameworks.

SCT continues to review and add to the list of recommended frameworks.

Continue

After you've used the service

When you've answered the relevant questions, you'll be given the most suitable framework based on your answers. This will point you to the providers' website where you can get quotes from suppliers on the framework.

If you need help

The DfE [buying for schools guidance](#) will help you prepare and research before buying to help you get the best deal and save money.

Continue

Selection of the Framework

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GOV.UK Find a DfE approved framework for your school

BETA This is a new service – your [feedback](#) will help us to improve it.

What are you buying?

☒ Goods

☐ Services

[Continue](#)

What goods do you need?

☐ Books and related materials

☐ Furniture

☒ ICT

☐ Personal protective equipment (PPE) and cleaning

[Continue](#)

Previous answers

[Start again](#)

What are you buying?

Goods

[Change](#)

GOV.UK Find a DfE approved framework for your school

BETA This is a new service – your [feedback](#) will help us to improve it.

What goods are you looking for in ICT?

☒ Hardware

☐ Networking equipment

☐ Printers, copiers and multi-functional devices (MFDs)

☐ Software

[Continue](#)

Previous answers

[Start again](#)

What are you buying?

Goods

[Change](#)

What goods do you need?

ICT

[Change](#)

Selection of the Framework

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**Find a DfE approved framework for your school**

BETA This is a new service – your [feedback](#) will help us to improve it.

Matching frameworks

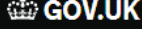
Based on your answers, there are multiple approved frameworks to choose from.

ICT, cloud, support and related services
Provider: Everything ICT

Education technology
Provider: CCS

Previous answers

What are you buying?	Goods	Change
What goods do you need?	ICT	Change
What goods are you looking for in ICT?	Hardware	Change

**Find a DfE approved framework for your school**

BETA This is a new service – your [feedback](#) will help us to improve it.

Your recommendation

ICT, cloud, support and related services

Based on your answers, we think you should use the Everything ICT framework.

What it offers

- Hardware such as PCs, laptops, tablets, servers, printers, multi-functional devices.
- Software such as Microsoft O365, Google, Adobe, cyber security, mobile device management, educational content, MIS and financial packages.
- Connectivity such as broadband, dedicated lines, 4G, 5G and satellite.
- Infrastructure such as wifi, cabling, wide area networks and network management.
- Cloud services, including Microsoft Azure, automated backup services, remote desktop, disaster recovery, VoIP systems.
- Mix of fully and partially managed services.
- IT Support, including staff training, onsite support technicians and remote helpdesk.
- Consultancy services, including cloud readiness assessment, review of technical infrastructure and existing contract reviews.

Related content

[Buying for schools guidance](#)

Benefits

- Choose from over 100 suppliers, including Microsoft, Dell, HP, Cisco, SMART, Promethean and niche providers.
- Save time with quotes which are relevant to you, often within 24 hours.
- Save money with reduced pricing through national deals.
- Multiple quotes or direct awards.
- Better value through suppliers benchmarked on cost, quality and service.
- Free advice on cloud solutions, relevant suppliers, procurement regulations and tendering processes.

All frameworks also offer:

- compliance with The Official Journal of the European Union (OJEU) principles and regulations
- a list of checked suppliers
- pre-agreed terms and conditions

[Visit the Everything ICT website](#)

Selection of the Framework

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Find a framework >

[See a list of all frameworks.](#)

Published 1 July 2019

Find a DfE approved framework for your school

BETA This is a new service – your [feedback](#) will help us to improve it.

DfE approved All frameworks

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- [Facilities management and estates](#)
- [Financial](#)
- [ICT](#)
- [Legal](#)
- [Personal protective equipment \(PPE\) and cleaning](#)
- [Recruitment and HR](#)

Books and related materials

[Library resources](#)

Includes the provision of books, e-books, journals/ periodicals, e-journals, audio books, audio summary, library discovery and associated services split into 4 lots with 12 suppliers. Curriculum books are also available via this deal.

Expires: 08/10/2022

Consultancy services

[Specialist Professional Services](#)

Specifically designed for the procurement of specialist professional services by the public sector covering a range of spend areas, including facilities management, catering, construction, environment, sustainability, waste, ICT and education consultancy. Extensive experience within the local authority and school sector.

Expires: 30/11/2023

Energy and utilities

[Electricity \(half hourly, non-half hourly and unmetered\)](#)

Provision of electricity, including half hourly, non-half hourly and unmetered supply. Provides additional support and associated services including demand side response, energy storage, electric vehicle charging, energy efficiency surveys and power purchase agreements.

Expires: 31/03/2023

[Electricity supply and ancillary services \(non-half hourly\)](#)

Electricity supply and additional services, such as automated meter reading (AMR), services to reduce consumption and energy supply from renewable sources.

Expires: 30/07/2021

[Firms mains gas](#)

A framework agreement for firm mains gas supplied through the National Grid. Online account information and additional support and associated services also available.

Expires: 01/04/2021

[Interest-free loans to fund energy saving schemes](#)

All maintained schools, academies, free schools and sixth form colleges can get interest-free loans to fund over 100 different technologies such as LED lighting, boiler replacements and insulation. Loans are designed to reduce your energy bills and have no upfront costs.

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Mini-Competitions or Buying Direct

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[Benefits](#)

[Framework Info](#)

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The Public Sector ICT Procurement Framework

Helping you buy the right ICT,
at the right price, at the right time, in the right way

[Get a quote](#)

£1,238,104
In Additional Savings Since July 2018

Savings reported to DfE since July 2018

[Who can use it?](#)

[What can I buy?](#)

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Managing a Supplier Contract

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- Responsibilities
- Monitoring
- Resolution
- Contact
- Disputes
- Amendments
- Who
- Terms
- Exiting

Contract Renewal

Variation agreement



Get Help with Buying for Schools

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Get help with buying for schools

Support for school business professionals.

Get support

Find a network for school business professionals

To find out more browse the Department for Education's directory of more than 100 [networks for school business professionals](#).

Set up a network for school business professionals

Find out more about [networks for school business professionals](#).

[Read how one school business professional established a peer-support network](#) linking 50 schools, improving financial health.

Find a regional hub

The DfE currently funds 2 regional buying hubs, following pilot schemes in the [north-west](#) and [south-west](#). As part of the next stage of this project, from January 2020, all schools in those regions are registered and can now access the hub services, free of charge.

Learning Outcomes

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Inspiring Futures



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Awareness of appropriate procurement regulations and how to ensure the school follows them



DfE recommended frameworks



Awareness of how to secure value for money / great outcomes from your expenditure



Conclusion

Other School Resource Management webinars:



Introduction to Procurement



Joined-up Leadership for
Effective SRM



Introduction to
Benchmarking



ICFP
Key Metrics Deep Dive



ICFP
During Times of Uncertainty



ICFP
using DfE Tools



Feedback



Resource Pack

<https://www.educationspace.co.uk/SRM/>



Question & Answer Session