



**St Augustine of Canterbury  
Catholic Primary School**

# Purchasing Policy

DATE: March 2023

Version History	Date	Reason for Amendment
1.0	16.01.2020	Format Revision
2.0	15.03.2021	Date of Ratification
2.1	07.11.2022	Review
2.2	22.03.2023	Review

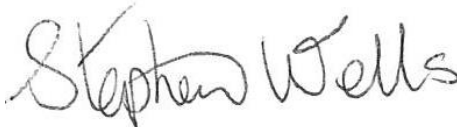
*“Created by God to Love and Learn”*

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## Document Information

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Author	Head Teacher	Review Frequency	Every 2 years  Subject to local education authority and/or national policy change
Date of Ratification	7 <sup>th</sup> November 2022	Related Policies	
Review Group	Finance, Staffing and Resources Committee	Ratified at Full Governing Body meeting 22 March 2023	
Review Date	November 2024	Chair of Governors Signature	

# Purchasing Policy

## Mission Statement

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St Augustine of Canterbury Catholic Primary School provides an education that inspires and nurtures God's children to succeed to their full potential as we are...

*"Created by God to love and learn"*

## Mechanism for Authorisation of Spending

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The following policy is intended to cover all spending on equipment, materials and services for the school. However, particular care should be taken where items of expenditure have not been budgeted for and are not included in the School Development Plan.

### 1. Authorisation

- a) Proposals for expenditure up to £3,000 should be referred to the Head Teacher for approval in advance of the expenditure being committed, for items identified on the budget and previously agreed by the Governing Body;
- b) Proposals for expenditure up to £3,000 by the Assistant Head Teacher, in the absence of the Head Teacher should be referred for approval in advance of the expenditure being committed, for items identified on the budget and previously agreed by the Governing Body;
- c) Proposals for expenditure up to £200 within budget may be authorised by the Business Manager, subject to ensuring that segregation of duties continues.
- d) Proposals for expenditure between £3,000 and £6,000 should be referred to the Finance, Staffing and Resources Committee ("FS&R") for prior approval;
- e) Proposals for expenditure between £6,000 - £50,000 should be referred to the Full Governing Body for prior approval;
- f) Proposals for expenditure greater than £50,000 should be referred to the South Glos. Local Authority and Clifton Diocese for prior approval;
- g) The Chair of Governors (or Chair of the FS&R) in consultation with the Head Teacher has the power to carry out functions of the Governing Body if a delay in exercising a function is likely to be seriously detrimental to the interests of the school, a pupil at the school, or their parents, or a person who works at the school. Any interim decisions must be documented (email etc) and reported at the next meeting of the FS&R Committee or Full Governing Body, where retrospective approval must be documented.

## **2. Approvals**

In order to ensure segregation of duties once items have been authorised, the official order will be approved by the Head Teacher and the subsequent invoice processed by the School Business Manager prior to authorisation by the Head Teacher. In the absence of either the School Business Manager or the Head Teacher their duties will be performed by the Assistant Head Teacher or Chair of the FS&R Committee, noting that he/she cannot perform both duties in relation to the same order, i.e. he/she can't act on behalf of the School Business Manager to approve the order and then on behalf of the Head Teacher to approve the invoice.

## **3. Tendering for Contracts and Equipment**

- a) If the anticipated value of a single line item purchase or contract is between £1,000 and £6,000 a minimum of three written, telephone, catalogue, internet or other method of price comparison should be obtained. A record of price comparisons should be kept on file.
- b) If the anticipated value of a contract or purchase is above £6,000 at least three written quotations should be invited from suitable suppliers. The details should be presented to the Governing Body using the High Value Pro-Forma attached as Appendix 1.
- c) Leases and other long term contracts should be referred to Caroline Vafeas, South Gloucestershire Council Technical Accountant for verification prior to proceeding.
- d) Full tendering procedures are required for expenditure over £50,000 (The Governing Body/Head Teacher will obtain advice from the Local Authority or Clifton Diocese in considering undertaking tendering procedures).

# Appendix 1

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**PROJECT/PURCHASE QUOTES FOR** .....

Supplier/Contractor	Value	Comments Other details / Discussions / Problems

Recommended Supplier/Contractor.....

Recommended at (state Committee if applicable).....

Date .....

Approved Supplier/Contractor .....

Agreed at/by (Full Governing Body) if applicable: .....

Date .....

Note:

Responsibility may be given to Working Party to review and evaluate projects/contracts/purchases.

The school must ensure authorisation is obtained in accordance with the 'Scheme of Delegation' for approving expenditure.

## Equality Impact Assessment - Groups that may be affected

Are there concerns that the policy could have a different impact on any of the following groups? (please tick the relevant boxes)	Existing or potential adverse impact	Existing or potential for a positive impact x or n.a.
<b>Age</b> (young people, the elderly; issues surrounding protection and welfare, recruitment, training, pay, promotion)		<b>x</b>
<b>Disability</b> (physical and mental disability, learning difficulties; issues surrounding access to buildings, curriculum and communication)		<b>x</b>
<b>Gender reassignment</b> (transsexual)		<b>x</b>
<b>Marriage and civil partnership</b>		<b>x</b>
<b>Pregnancy and maternity</b>		<b>x</b>
<b>Racial groups</b> (consider: language, culture, ethnicity including gypsy/traveller groups and asylum seekers)		<b>x</b>
<b>Religion or belief</b> (practices of worship, religious or cultural observance, including non-belief)		<b>x</b>
<b>Gender</b> (male, female)		<b>x</b>
<b>Sexual orientation</b> (gay, lesbian, bisexual; actual or perceived)		<b>x</b>