

Contents

Overview.....	2
Responsibilities.....	2
UoBAT Procurement Limits	3
Requirements for Specific Limits	4
Limit A	4
Limit B	4
Limit C	4
Quotes Procedure	4
Formal Competitive Procurement Procedure	5
Tender competition through frameworks.....	5
Tender by non-advertised supplier list to known suppliers.....	5
Negotiated Tender	5
Waiver Mechanism.....	6
Policy Status and Review	6
Appendix 1: Legal and Regulatory Framework	7
Appendix 2: Guidance on formal competitive procurement processes	8
Appendix 3: Guidance on Frameworks	12
Appendix 4: Guidance on Procurement Approval Limits	14
Appendix 5: Guidance on Waivers	15
Appendix 6: Preferred Suppliers.....	16

Overview

- 1.1 The Standard Procurement Procedures support the University of Brighton Academies Trust's (UoBAT) Financial Regulations and reflect the requirements of the Education and Skills Funding Agency (ESFA) as set out in the Academies Financial Handbook. The requirements of the Academies Financial Handbook must be adhered to by everyone associated with or employed by the Trust.
- 1.2 This document establishes how the Trust's employees are expected to comply with that guidance and provides the framework by which procurement decisions are taken.
- 1.3 When considering making any purchase on behalf of the Trust, staff need to consider the procurement and the supply chain of that purchase. Staff need to consider the content of impacting legislation including, but not exclusively, the Bribery Act 2010 and Modern Slavery Act 2015 (see appendix 1).
- 1.4 The Trust recognises the availability of local business within our community and seeks to continue to provide the opportunity for those that are proven to be competitive to bid to provide their services within a competitive process.
- 1.5 In order to support our objective of achieving value for money, the Trust operates a policy of "Frameworks by Default". This means our preferred default position is to purchase through existing DfE approved frameworks, where possible. See appendix 3 for more information on frameworks.
- 1.6 Procurement decisions must be clearly recorded to ensure that each decision has been reached fairly and provides a clear audit trail as appropriate, given the value and risk of the purchase.

Responsibilities

- 2.1 Individuals with relevant knowledge, expertise and experience, including the end-users, should normally be involved in purchasing goods and services. For strategic procurement assistance, the Procurement Officer can offer support for the potential purchase and determine an appropriate procurement methodology to ensure the most effective and efficient decisions are reached.
- 2.2 All staff who purchase goods and services on behalf of the Trust are required to ensure that they have been provided with the appropriate authority for each individual exercise, as stated within the scheme of delegation or must ensure that a purchase order has been approved by an appropriate colleague with the correct level of authority for the procurement.
- 2.3 The depth to which a procurement exercise must take will vary depending on the level of expenditure proposed. These limits are identified in the table below.

- 2.4 It is the responsibility of the Budget Holder to maintain adequate controls over their expenditure, and to ensure that no purchasing activity will exceed available funds. Budget holders will have full visibility of their available spend for the year and will be supplied with actual spend against this on a monthly basis.
- 2.5 Under no circumstances must an official order be placed for works, goods or services required in a personal capacity.

UoBAT Procurement Limits

3.1 UoBAT's procurement limits, excluding VAT are:

Limits	Requirements	Preferred Supplier Status (appendix six)	
		No	Yes
Limit A	One quote/negotiation	$X < \text{£}2\text{k}$	$X < \text{£}5\text{k}$
Limit B	Three quotes	$\text{£}2\text{k} > X < \text{£}25\text{k}$	$\text{£}5\text{k} > X < \text{£}25\text{k}$
Limit C	Formal competitive procurement	$\text{£}25\text{k} > X < \text{£}189,330$	
EU Regulations		$X > \text{£}189,330$	

3.2 In accordance with the Trust's Financial Regulations, the Executive Director of Finance & Operations is responsible for ensuring the Trust complies with its legal obligations concerning EU procurement legislation. EU procurement regulations apply to written contracts for all forms of procurement, purchase or hire (whether or not hire purchase) with a total value exceeding a threshold value.

3.3 Purchases over the thresholds set out below may fall under EU procurement rules:

Thresholds from 01Jan18 (net of VAT)	Goods	Services	Works
Public sector contracting authorities including academies	£189,330 €214,000	£189,330 €214,000	£4,733,252 €5,350,000

These thresholds are reviewed every two years. Where the European Union procurement directive applies, the Procurement Officer will provide guidance and assistance with the process and timescales.

- 3.4 These thresholds refer to the value over the life of the contact. Where this is not known four years should be assumed.
- 3.5 The help and advice of third-party procurement specialists may be sought where the threshold may be breached.
- 3.6 Purchasers need to be aware that the procurement planning process needs to allow sufficient time for EU advertising and other aspects of the procedure to take place. Purchasers should allow a minimum of 3 months from advert to award, once all the required documentation has been compiled

Requirements for Specific Limits

Limit A

- 4.1 For contracts for works, supplies or services (including consultancy) with an estimated cost within the Limit A range, the budget holder will obtain at least a single written quotation (and more than one where practicable), or place an order with a contractor under a Framework Agreement or Consortia, where such arrangements exist.
- 4.2 The aim is to identify the best source for the provision of the goods or services. Written details of quotations obtained should be retained with the purchase order, GRN and invoice for audit purposes. Telephone quotes are acceptable if these are evidenced via an emailed confirmation of each quote which has been received before a purchase decision is made.

Limit B

- 4.3 In the case of contracts (including consultancy) with an estimated cost in the Limit B range, the budget holder will be required to obtain at least three written quotations or place an order with a contractor under a Framework Agreement or Consortia, where such arrangements exist.

Limit C

- 4.4 Contracts (including consultancy) with an estimated value exceeding Limit C should normally be let by formal competitive tender process and must be developed with reference to the Procurement Officer who will provide the appropriate level of assistance.
- 4.5 Where the estimated value of the contract is in excess of the relevant EU threshold, EU procurement procedures must be followed. Where possible and appropriate, pre-existing framework agreements will be the preferred method of compliance to EU regulations for purchases.

Quotes Procedure

- 5.1 For purchases between £2,000¹ to £25,000 in value, staff are required to obtain a minimum of three written quotations from suppliers.
- 5.2 The total purchase requirements must not be disaggregated below the threshold to avoid the obtaining of quotes.
- 5.3 A Purchase Order (PO) requisition must be raised, authorised and submitted to the finance department before the goods are ordered, received and the invoice paid. The PO number must be provided to the supplier when placing the order.

¹ At least one quotation is required for purchases up to £5,000 if the supplier is on the preferred supplier list

Formal Competitive Procurement Procedure

- 6.1 This is the formal process to be implemented where purchases for works, goods and services are likely to exceed £25,000 in total (excluding VAT) for the period of the subsequent contract. There will be the need to ensure that an equal and fair competition process is followed, using a minimum of four suppliers, provided with the same request details, in the same format, to be returned by a set date. This may be adapted to meet the requirements appropriate for the purchase, this must be discussed with the Procurement Officer prior to any procurement activity being undertaken.
- 6.2 Any/all communications in a formal competitive process should initially be facilitated via the dedicated procurement mailbox, tenders@brightonacademiestrust.org.uk.
- 6.3 The process will require that all suppliers are provided with the initial documentation at the same time with a pre-determined return date and time.
- 6.4 UoBAT's preferred approach to formal competitive procurement (in order) is:
 - Tender competition through frameworks
 - Tender by non-advertised supplier list to known suppliers
 - Negotiated tender

The specific requirements of these processes, and further guidance related to formal competitive processes are out in appendix 2.

Tender competition through frameworks

- 6.5 When there is an available DfE recommended framework which is available to run a specific category competition this is the preferred formal procurement process. Appendix 3 provides more information on available frameworks.
- 6.6 The specific process to follow will be determined by the framework itself.

Tender by non-advertised supplier list to known suppliers

- 6.7 This is where suppliers are specifically invited to tender. Restricted tenders are appropriate where:
 - There is a need to maintain a balance between the contract value and administrative costs;
 - Large number of suppliers would come forward or because the nature of the goods or service are such that only specific suppliers can be expected to supply the academy's requirements;
 - The costs of publicity and advertising are likely to outweigh the potential benefits of open tendering;
 - There is no suitable framework, or any existing framework would demonstrably not offer value for money and/or deliver an appropriate service.

Negotiated Tender

- 6.8 The terms of the contract may be negotiated with one or more chosen suppliers. This is appropriate in specific circumstances:
- The above methods have resulted in either no tenders or unacceptable tenders;
 - Only one or very few suppliers are available;
 - Extreme urgency exists;
 - Additional deliveries by an existing supplier are justified.

Waiver Mechanism

7.1 On rare occasions it may be impracticable/unfeasible to comply with the requirements of this policy. In this case a waiver form must be completed outlining details of the purchases and the business justification supporting why a specific requirement could not be complied with. It is essential the Waiver is granted before the procurement activity can progress further. Such authorisation must come solely from the Executive Director of Finance & Operations.

Policy Status and Review

Written by:	Head of Finance
Owner:	Head of Finance
Status:	Approved
Approval date:	25 th February 2020
Review Date:	

Appendix 1: Legal and Regulatory Framework

The Trust's procurement policy, in common with our other policies, reflects a range of UK legislation. Below is a high-level overview of some, but not all, of the key regulations that our policy is built upon.

Bribery Act 2010

- a. The Bribery Act 2010 was published by the Ministry of Justice in March 2010 and became enforceable from 01st July 2011. This act modernises the law on bribery. The Trust, its employees and contractors/bidders are all covered by the Act.
- b. Very generally bribery is defined as giving someone a financial or other advantage to encourage that person to perform their functions or activities improperly or to reward that person for having already done so. This could cover seeking to influence a decision-maker by giving some kind of extra benefit to that decision maker rather than by what can legitimately be offered as part of a tender process.
- c. The trust is committed to acting professionally, fairly and with integrity, meaning we take a zero-tolerance approach to any acts of bribery or corruption. Bribery is punishable for individuals by up to 10 years imprisonment and substantial fines, said fines can be extended onto the trust if found to have taken part in any activities.
- d. Facilitation payments, which are payments to induce officials to perform routine functions they are otherwise obliged to perform, are bribes. There is no exemption under the act for payments of such nature.
- e. You are encouraged to raise concerns about any issue or suspicion of malpractice at the earliest possible stage. If you are unsure whether a particular act constitutes potential bribery, or if you have any other questions/concerns, these should be raised immediately with the Procurement Officer.

Modern Slavery Act 2015

- a. The Modern Slavery Act is an Act to make provision about slavery, servitude and forced or compulsory labour and human trafficking, including provision for the protection of victims; to make provision for an Independent Anti-slavery Commissioner; and for connected purposes. Whilst not all of the Act is directly relevant, we need to be familiar with section 54 entitled 'Transparency in supply chains'.
- b. All suppliers to the Trust are required to fully comply with the Modern Slavery Act 2015 and will confirm that they do so by accepting the Trust's Terms and Conditions which include specific requirements. The Trust also reserves the right to exclude any bidder who has been convicted of an offence under section 1, 2 or 4 of the Act. The Trust also reserves the right to terminate contracts where bidders are found to have breached the legislation after contract award.
- c. Where the Trust has identified that a procurement exercise is particularly high risk it may be appropriate to require bidders to provide clarification of supply chains and ensure that suppliers demonstrate their methods of corporate social responsibility during the tendering and selection process, details of which may vary according to the project

Other related legislation

- a. Proceeds of Crime Act 2002
- b. Terrorism Act 2000
- c. Money Laundering Regulations 2017
- d. Criminal Finances Act 2017

To obtain more information on any of the above please contact the Procurement Officer.

Appendix 2: Guidance on formal competitive procurement processes

1. Actions to assist the tender process

- a. Based on the procurement need, should a Request for Proposal (RFP) process be required, then the below list of action points will need to be completed:
 - Options available should be documented;
 - Basis for scoring and ranking should be documented;
 - Individuals responsible for scoring and ranking should be documented;
 - For Request for Proposals (RFP) a full specification or statement of requirements (SOR) needs to be compiled with assistance from the Procurement Officer and a unique number will be issued for the project;
 - Outcome of the scoring and the final decision should be documented;
 - Reasons on which the decision was reached should be clearly documented;
 - Supplier clarifications should be included in the contract
- b. All key documents should be retained together by each academy or department for their records and audit purposes, with an electronic version of all approved and duly signed & dated contracts being sent to the Procurement Officer at for inclusion within the central "Contract Register"
- c. Records requiring retention include:
 - Request for proposals (RFP);
 - Statement of requirements SOR / Tender specification;
 - Copy of the cover letter sent out to participating suppliers;
 - Tenders received from bidders;
 - Quotes obtained for smaller purchases;
 - Papers, minutes & documentation relating to the procurement decision including opening process document and signature of staff present with date;
 - Signed & dated copies of the contracts awarded;
 - Invoices.
- d. Where procurement is carried out with the assistance of an external project management company key documents should be transferred to, and retained by, each academy or department prior to cessation of the contract with the project management company.
- e. Opportunities should be taken for bulk purchase discounts, for example by combining similar orders. This can be done by combining the requirements of several academies, with costs being shared proportionately.
- f. When ordering goods and assessment of likely delivery timeframes should be made by the purchaser and agreed arrangements made to ensure appropriate staff are available on site to receive them (particularly during school holidays), and that adequate space is available to locate or store the delivery.

2. Preparation for Tender

- a. Full consideration should be given to:
 - Objective of project;
 - Overall requirement specifications;
 - Technical skills required and expert knowledge (Internal / External);
 - After sales service requirements such as SLA and how will it be monitored;
 - Terms and conditions fair to both parties reviewed and potentially amended prior to contract signing
- b. Before going out to tender the purchaser will need to decide on the appropriate criteria on which the suppliers will be scored, and then weight the criteria in accordance with its importance to the

procurement. The Procurement Officer can provide guidance on choosing the appropriate standards to be measured, and possible weightings, on request. From the analysis scores, it should be apparent which supplier is ranked first.

- c. However, before awarding purely on the analysis, further due diligence should be carried out on the potential supplier. This is necessary to:
 - Ensure they have the capacity to meet the Trust's needs now, and in the future
 - Check the financial stability of the supplier by reviewing their published accounts (Look up on Companies House Beta website <https://beta.companieshouse.gov.uk/>)
 - Check that the supplier is not due to be struck off from trading (Companies House Beta)
 - Check supplier related parties (Companies supplier is associated to, and what other directorships the supplier's directors hold, to look for any conflicts of interest, via Companies House beta)
- d. It is essential to establish an appropriate scoring & rank basis of each specific elements of the contract requirements at outset of the tender / RFP process, so the tender documentation can include the information as a matter of best practice providing a transparent and fair guide on the marking criteria to suppliers. This can assist suppliers in identifying which are the most important elements of the specification which must be fulfilled, which are desirable, and which are potential elements that could be forgone (E.g. mandatory, desirable and additional). There will then be a clear basis to work out the ranking of each supplier's submission, ready for your business case submission for approving and then contract award.

3. Request for Proposals

- a. An RFP should include the following:
 - Introduction/background to the project;
 - Scope and objectives of the project;
 - Technical requirements / list of specifications;
 - Evaluation criteria which will potentially determine the winning bidder;
 - Implementation of the project, detailed plan of action with milestones;
 - Terms and conditions of tender relevant to the procurement, and
 - Form of response – How suppliers are to respond back to Trust, and the process for award.

4. Aspects to consider

Financial

- a. Compared like with like, so if a lower price means a reduced service or quality, this should be borne in mind, when reaching a decision.
- b. Financial stability and level of insurance held (Especially for construction projects, Travel, Leasing contracts, etc.).
- c. Care should be taken to ensure that the tender price is the total price and that there are no hidden or extra costs (Annual maintenance charges, decommissioning charges, Additional insurance, Etc.).
- d. Can further negotiation lead to reduce costs (E.g. Bulk supplies to all academies, discounts, commissions, reduced delivery costs, increased quality for same price, increased quantities for same prices, increased service performance, etc.)

Technical/Suitability

- a. All suppliers should have their technical suitability's reviewed fully during any bidding processes, with focuses on the following aspects from the Trust's point of view:
 - Qualifications of supplier's key staff working on project

- Resources committed to the contract in terms of financial & non-financial costs to the Trust
- Relevant experience of the key staff with provable recommendations
- Descriptions of all technical & service facilities being provided to ensure the 5”R”s (Right - Time, Place, Price, Quality & Quantity) can be monitored & redressed where falling short
- Certificates of quality/conformity with standards (Copies required)
- Quality control procedures need to be agreed at the outset of the contract
- Health and safety policies of suppliers need to be compliant with laws, regulations and Trust’s procedures

5. Other Considerations

- a. Pre-sales demonstrations – Prior to demonstration make a list of all requirement questions to ask representative and ensure that the same set of questions is asked of all suppliers, to enable comparison.
 - Carbon management and sustainability - Find out what the suppliers’ policies are for carbon management & sustainability and how this could impact on the Trust if a contract was signed.
 - After sales service – Request an SLA, decide who is responsible in the Trust to monitor the SLA, and what the escalation process will be in the event of underperforming services.
 - Financial status of supplier. Suppliers in financial difficulty may have problems completing contracts and in the provision of after sales service. It may be appropriate to have an accountant or similarly qualified person examine audited accounts etc.

6. Tender Opening Procedures

- a. All tenders are to be submitted into the tenders@brightonacademiustrust.org.uk mailbox, they should be opened at the same time and the tender details should be recorded. A minimum of two persons should be present for the opening of tenders selected from a Director from the Central Trust Management Staff and another senior member of Trust staff
- b. A separate record should be established to record the names of the firms submitting tenders and the amount tendered. This record must be signed by both people present at the tender opening.

7. Tender Evaluation Procedures

- a. The evaluation process should involve at least two people. Those involved should disclose all interests, business and otherwise, that might impact upon their objectivity. If there is a potential conflict of interest, then that person must withdraw from the tendering process, and be replaced by an alternative member of staff without a business interest. The register of business interests should be updated to reflect conflicts.
- b. Those involved in procurement decision making, must take care not to accept gifts or hospitality from potential suppliers that could compromise or be seen to compromise their independence.
- c. Full records should be kept of all criteria used for evaluation any contract, with contracts over £25,000 requiring an in-depth business case which is required to be report to the Finance & Resources Committee for potential approval. The business case must highlight the relevant issues and make recommendations for a decision.
- d. Where required by the conditions attached to a specific grant from the DfE or other government or fund provider, the Department’s approval must be sought and obtained before the acceptance of a submission (E.g. Finance leases, New Building works)
- e. The accepted submission should be the one that is economically most advantageous to the academy i.e. based on price and quality (meeting the criteria most closely). All parties should then

be informed of the decision and where practicable feedback should be offered to unsuccessful suppliers.

8. Post tender negotiations

- a. Post-tender negotiations (i.e. after receipt of formal tenders but before signing of contracts) with a view to improving price, delivery or other tender terms can be entered into provided that:
 - it would not put other tenderers at a disadvantage
 - it would not affect their confidence and trust in the Trust's tendering process.
- b. In each case a statement of justification should be approved by the Principal or relevant senior manager prior to the event showing:
 - background to the procurement
 - reasons for proposing post-tender negotiations
 - demonstration of the improved value for money.
- c. Staff must ensure that prices negotiated and quoted/tendered are to remain confidential and on no account must these be notified to competitor suppliers.

9. Contract Extension or Variation

- a. Variations to a contract must not be accepted without evidence of a formal written agreement with the supplier/contractor setting out the full price, time and/or resource implications.
- b. Approval from the relevant person indicated in the Scheme of Delegation is required if the proposed variation or series of variations would:
 - increase the contract value by more than £5,000 (excluding VAT); and/or
 - increase the contract period by 50% or more; and/or
 - mean the works, services or goods to be added to or be deleted from the contract are substantially different in scope;
- c. Unless stipulated in the original contract documentation contract extensions and/or variations require prior Trust approval.
- d. If the value of the extension/variation or the total of subsequent extensions/variations is in excess of:
 - £15,000, it will require the approval of the Executive Director of Finance & Operations, with mini business case;
 - £50,000+, it will require the approval of the Finance & Resources Committee through a full business case proposal (or Chair and CEO and reported to the Finance and Resources Committee at its next meeting);
 - The relevant EU threshold*, it is not permitted.
- e. Extensions to contracts exceeding the relevant EU Threshold are not permitted unless they are indicated in the original OJEU notice. For contracts below the relevant EU Threshold, extensions to such contracts shall not be permitted if the revised value then exceeds the relevant EU Threshold.

Appendix 3: Guidance on Frameworks

The Trust actively supports the use of framework contracts negotiated by Public Sector Buying Organisations. Please see grid which shows the DfE school deals frameworks designed with educational establishments in mind.

- The Crown Commercial Services (CCS)
- The Pro 5 – Eastern Shires Purchasing Organisation (ESPO), ESPO Academies, Central Buying Consortium, Yorkshire Purchasing Organisation (YPO), North Eastern Purchasing Organisation (NEPO),
- Other Local Authority or NHS Agreements
- Crescent Purchasing Consortium (CPC)

Staff using frameworks will only be required to obtain quotes through the framework suppliers listed in line with the procurement approval limits set out for preferred suppliers (see appendix six).

Before using any framework for the first time, the Procurement Officer should be consulted.

DfE School Deals recommended Frameworks

The Department for Education has arranged various frameworks to be made available for the academies sector to use. These frameworks are recommended to be used by academies when making certain purchases. These framework deals generally allow schools to procure goods and services at better value for money due to the combined buying power of participating organisations.

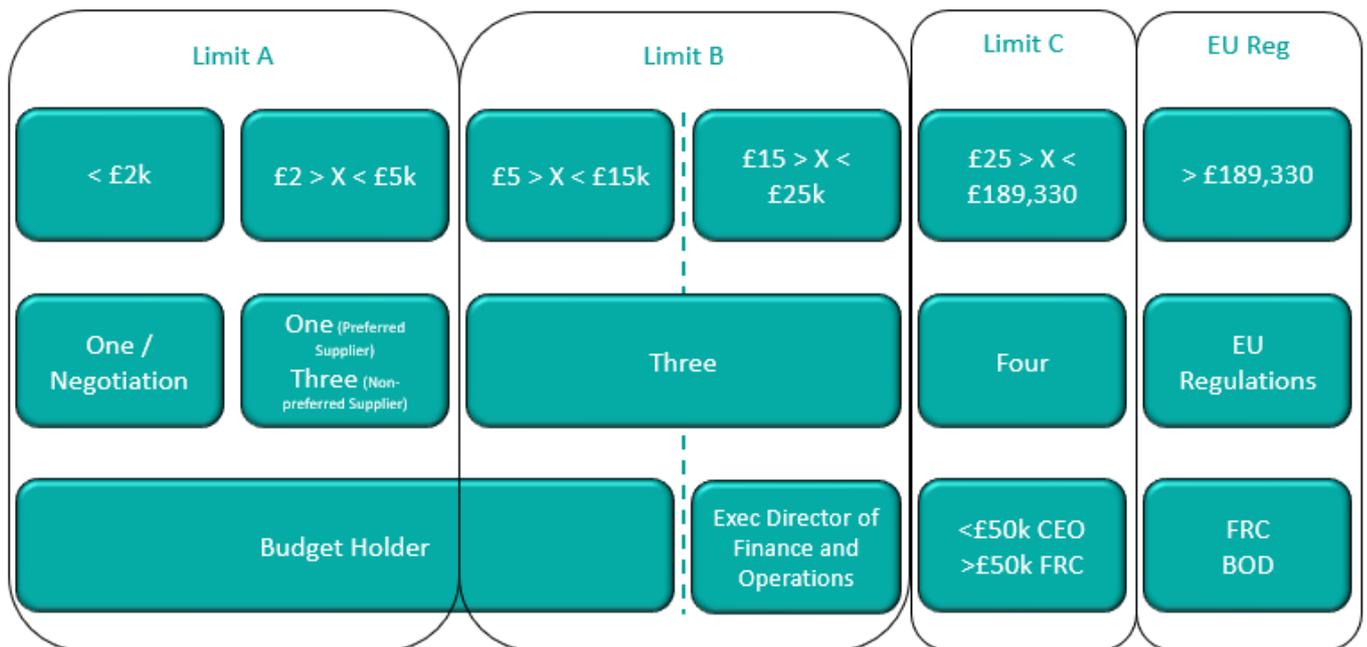
Below is a grid which lists procurement categories with ticks indicating which of the procurement framework providers are recommended by the DfE for that listed category of good or services. In some instance there is more than one framework provider providing a category, which will mean there is more choice of potential suppliers.

The Trust has agreed that when deciding to make a purchase over £25k, that the DfE grid is checked to see if there is a framework provider which covers the procurement need. This would therefore be the preferred route to market in the first instance, to ensure that the Trust get the best value for money with the least associated risk.

The grid also indicates “Recommended Providers” who are suppliers which the DfE recommend for specific spend categories, and they are the only supplier the DfE are working with for that supply.

DfE School Deals	Framework providers							Recommended providers		
	CCS	CPC	ESPO	KCS	NEPO	YPO	Gov. (DfE)	Fusion 21	Salix	ThinkIT
Audit Services		✓								
Audit Services - Spend analysis & recovery	✓									
Books & Material			✓							
Employee screening services		✓								
Energy Electricity and ancillary services	✓									
Energy Gas supply and ancillary services	✓									
Firm mains Gas						✓				
Energy efficiency -RE:FIT National energy performance contracting	✓									
Energy efficiency - Improvements from Retrofit								✓		
Energy efficiency - Loans to fund energy saving schemes									✓	
Estates - Catering, Cleaning, Security, Ground maintenance, Waste	✓									
Estates professional services - Building & Cleaning services, PAT testing		✓								
Facilities Management	✓									
Furniture					✓					
Estates - Removal, Relocation & additional services		✓								
ICT - G Cloud 10	✓									
ICT - Infrastructure		✓								
ICT - MFD	✓	✓		✓						
ICT - PCs		✓								
ICT - Software		✓								
ICT, Cloud, Support & Related Services										✓
ICT - services for education	✓	✓								
ICT - Technology products 2	✓									
Insurance (Insurance not covered by RPA)		✓								
Legal services		✓								
Library resources		✓								
Office Supplies / Stationery			✓							
Professional services					✓					
Recruitment - Supply teachers & agency staff	✓									
Risk protection Insurance							✓			
Water	✓									
Key										
Crown Commercial Services	CCS									
Crescent Purchasing Consortium	CPC									
Eastern Shires Purchasing Organisation	ESPO									
Kent County Supplies	KCS									
North Eastern Purchasing Organisation	NEPO									
ESFA (RPA) Insurance	Gov.									

Appendix 4: Guidance on Procurement Approval Limits



Appendix 5: Guidance on Waivers

- a. UoBAT allows for a waiver of the standard procurement procedures, in certain limited circumstances. Generally, the only acceptable occasions when a waiver application would be accepted are:
 - There is a case of genuine urgency (due to a health and safety or security breach for example); or
 - There is demonstrably only one provider with the required technical knowledge or with the exclusive rights to use the necessary equipment/processes; or
 - The existing provider is the most capable of providing the goods/service **and** can demonstrate to provide the best value for money.
- b. Under no circumstances will a waiver request be granted if the procurement exercise falls into the realms of EU Regulations (as identified in section 3.3)
- c. Waiver applications will be reviewed, and can only be granted, by the Executive Director of Finance and Operations. [Hold control and click here](#) to gain access to the application form.
- d. Until official notification has been received by the applicant that the waiver has been granted the procurement process must not be progressed.

Appendix 6: Preferred Suppliers

- a. A preferred supplier (PS) is one with whom the trust has negotiated an agreement/contract with. Said agreement/contract could include, for example:
 - Price discounts
 - Delivery arrangements
 - Customer service requirementsThe agreement/contract will be for a specified period of time.
- b. The PS agreement formalises the relationship between the third party and the trust. Those selected to be categorised as a PS will be done so based on their strategic and economic benefit with the trust. In summary, using a PS is to ensure that the trust obtains the best value for money by exerting the maximum leverage on suppliers to improve prices, quality and/or service.
- c. PS agreements will be trust-wide, meaning the same prices and service levels will be available to all academies and services within the trust.
- d. Due to the benefits negotiated for inclusion as a PS the trust supports and strongly recommends the use of our PS's.
- e. The Central Finance team will control a database for recording who our PS's are, this database is referred to as our preferred supplier list (PSL). The PSL will be made available internally via the Finance section of the trust's intranet.
- f. The PSL will contain the following:
 - Supplier name and contact details
 - Supply category (e.g. telephony, stationary, supply, etc)
 - Contract/agreement start and end dates
 - Key features, as negotiated to be included on the PSL
 - Any other conditions key to the PS agreement (i.e. clauses re supply by other parties, discount codes, etc)
- g. The Central Finance team will manage the inclusion of suppliers onto the PSL. Any questions regarding PS's should be directed to the finance@brightonacademiestrust.org.uk mailbox with 'PSL Query' in the subject line of the email.