



Purposes

1. To institute procedures to be followed where work is subject to competitive pricing.
2. To ensure that the appropriate procurement process is followed.
3. To ensure that standardised competitive pricing procedures are able to withstand examination by others, thereby reflecting positively on the manner in which the Board manages its maintenance and capital works.

Guidelines

1. Principal's authority
The Principal may initiate works / purchasing without Board of Trustees approval in the following circumstances:
 - Breakdowns / repairs to the value \$1000, using a tradesperson/supplier of his/her choice.
 - Pre-approved budgeted expenditure – using the Quotation Process.
2. Other expenditure
 - Unless the Board of Trustees consider that the "Tender Process" is more appropriate, the Principal or Board of Trustees representative will be expected to follow the Quotation Process for all expenditure exceeding \$1000.
 - The Board of Trustees will be consulted for all work exceeding \$500 that has not been allocated funds within the budget.
 - If the Board of Trustees consider it appropriate, their approval will be obtained prior to accepting the quote / tender.
3. Pecuniary Interests
Employees of the school and members of associated organizations (PTA, Whanau Group etc) must, where applicable, declare any pecuniary interests and withdraw from the decision making process' for selecting a suitable vendor to procure from.

Quotation Process

- 1 Principal or approved Board of Trustees representatives to obtain written quotes from 3 tradespersons / suppliers.
2. Quality and price will be considered in all cases, however the most competitively priced quotation will not always be accepted.
3. The Principal or Board of trustee Representatives reserves the right not to accept any quotation received and to call for new quotations.

Tender Process

- Tenders shall be called publicly inviting interested contractors to bid.
- The answering of enquires during the tender period should be restricted to the two people responsible for overseeing the work on behalf of the Board of Trustees.
- Tenders will be received, up until the advertised closing time, in a tender box located in the Principal's office.
- Tenders are not to be examined prior to the notified closing time.
- Opening and recording of tenders will be done by the Principal, or representative, and two members of the Board. A record of tenders will be completed at this time containing:

- names of tenderers
 - tender prices
 - any tags related to the tenders.
- The three people opening the tenders will then sign the record, noting the date/time of opening.
- Evaluation of tenders shall be undertaken by two delegated members of the Board, in consultation with the Principal. Following evaluation of all eligible tenders, the delegated Board members will prepare a report for the next Board meeting, including a recommendation as to which tender (if any) is recommended for acceptance. The Board of Trustees reserves the right not to accept any tender received and to call for new tenders.
- Any effort by a tenderer to influence the process of examination, clarification, evaluation and comparison of tenders, and in decisions concerning award of contract, shall result in the rejection of the tenderer(s) concerned.
- Allandale School shall not receive, process or disburse funds under controls that are insufficient to meet the board-appointed auditor's standards.
- Allandale School shall not invest or hold operating capital in insecure accounts or in non-interest-bearing accounts except where necessary to facilitate ease in operational transactions.

CROSS REFERENCES

Finance Policy
 Fraud Policy