

# Briefing note

**To:** Schools Forum **Author:** Christina Ponting (Denise Pearson)

**Date:** July 2019

**Purpose of the Paper:**

Information	√
Consultation	
Decision	√

**Title of Briefing:** Schools Procurement SLA September 2019 – 31<sup>st</sup> March 2020

## Background:

In April 2019, a report was presented to Schools Forum which noting due to the resignation of the Schools Procurement Officer Schools Forum had the option to determine if they wished to continue with a post or if they wished to consider other options. Schools Forum agreed they wished to explore an equivalent SLA which also contained an element of School to School support.

The current funding allocated per annum has been circa £25,000 as the post holder was term time only. Historically funds were allocated from Headroom funding.

## Current Position:

The Procurement Service (delivered via the NTC/ENGIE Partnership) have confirmed they can put in place an equivalent SLA and oversee an updated service delivery model to address current and evolving needs on an annual basis.

## Proposal:

The equivalent SLA would consist of direct technical support; support and guidance for Schools with queries for Schools; dedicated team members from within the NTC/ENGIE Procurement team. The SLA would be delivered on an annual basis and would support Schools to continue with the Business Managers Procurement network group, provide for termly updates/training for Business Managers/ Head teachers and the facilitation of School to School support (which would be agreed on a periodic basis). Additionally support for Governors would also be provided with wider School related matters so that they were clear of their roles and responsibilities in wider school related strategic or longer term matters.

School to School support would involve an experienced team member from one School supporting a colleague in another School (a standard fee structure for this would be determined) with either a one off project, or as part of initial or on-going development –

and the NTC/ENGIE Procurement team would facilitate and oversee this. In addition, the equivalent SLA would also be used to support training and development for Governors, Business Managers Group/ Procurement Leads and Head teachers as a whole – working with the network group to look at areas of interest and more technically focused workshops being delivered by NTC/ENGIE or other/ external colleagues.

The NTC/ENGIE team would also further develop the information on the Schools SLA Portal with a dedicated Schools Procurement page including Schools focused reference documents, policy guidance, training/ coaching guides, etc.

The equivalent SLA would be required to present a report to Schools Forum on an annual basis inclusive of the Service Managers funding Reports and would be subject to call-in. The equivalent SLA funding would continue to be allocated from Headroom and in the event that the funds were not spent on an annual basis remaining funds would be returned to the general Headroom budget for allocation via those means. For those Schools who do not contribute to Headroom a per pupil rate will be determined and if those Schools wish to be part of this equivalent SLA they will need to provide funds/ buy-in on an individual/annual basis.

The previous Service Manager Report is noted at Appendix A for reference and an indicative/headline draft equivalent SLA is noted at Appendix B for reference.

It is anticipated in a full year the SLA will operate as follows:

£10,000 -	Technical Procurement Support and Guidance from NTC/ENGIE
£ 5,000 -	To support Business Manager Network Groups, Termly Updates, Training
£10,000 -	School to School Support
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£25,000 -	Total April – March

From September 2019 – March 2020 this would be pro-rated as follows:

£ 5,800 -	Technical Procurement Support and Guidance from NTC/ENGIE
£ 3,000 -	To support Business Manager Network Groups, Termly Updates, Training
£ 5,800 -	School to School Support
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£14,600 -	Total April – March

## Recommendations:

Schools Forum having read this report and clearly understanding the information provided consider this report and note the following:

Please Note: Whilst all members of Schools Forum are able to pass comment/ give a view it will only be those members of Schools Forum who directly fund the post (via Headroom funding) who would be eligible to vote on any recommendations/ decisions?

See table below for clarity.

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North Tyneside Schools Forum Member Roles & Voting								as at December 2018	
de-delegation Primary	de-delegation Secondary	scheme for financing schools	consultation on funding formula	General Duties	Retained Duties	all other matters			
1	2	3	4	5	6	7			
Voting							Phase	Role	
School Members									
x		x	x	x	x	x	First	Head	
x		x	x	x	x	x	Primary	Head	
	x	x	x	x	x	x	High	Head	
	x	x	x	x	x	x	Middle	Head	
	x	x	x	x	x	x	Secondary	Head	
Other School Members Non Locality Based									
x		x	x	x	x	x	Primary/ First	Governor	
	x	x	x	x	x	x	Secondary/Middle	Governor	
		x	x	x	x	x	Nursery	Head	
		x	x	x	x	x	PRU	Head	
		x	x	x	x	x	Special	Head	
			x		x	x	Academy	Other	
Non Schools Members Non Locality Based									
		x	x			x	16-19 Providers	Other	
			x			x	EY PVI	Other	
						x	C of E Diocese	Other	
						x	RC Diocese	Other	
						x	EOTAS/LAC	Other	
						x	Trades Union	Other	

1. Do Schools Forum:
  - a. wish to progress with an equivalent SLA for the remainder of this Financial Year?
  - b. to review the equivalent SLA in the Spring Term 2020 for consideration of continuation from April 2020, or
2. Do Schools Forum request the equivalent SLA to continue on an annual basis subject to review alongside other Service Manager Reports?

## Appendix A

Service Manager:	David Baldwin (Janine White)
Title of Service Provided:	Schools Procurement Officer
A description of what the service provides to schools because of this funding allocation	<p>The support provided by the Schools Procurement Officer is offered to all schools within the borough of North Tyneside</p> <p><b>Procurement Support:-</b></p> <ul style="list-style-type: none"> <li>• General procurement advice</li> <li>• Tendering support (manage the process on behalf of the school)</li> <li>• Analysis of terms and conditions prior to a School signing any contract to help them understand the commitment</li> <li>• Contract advice and support</li> <li>• Contractor advice and support at meetings</li> <li>• Benchmarking on spend areas</li> <li>• Quotation requests undertaken on behalf of schools</li> <li>• Legal advice offered on procurement</li> <li>• Group procurement undertakings</li> <li>• Meeting with current and prospective suppliers / contractors on behalf of schools and disseminating information.</li> </ul> <p><b>Contractor Support:-</b></p> <ul style="list-style-type: none"> <li>• Collating IR35 declarations and holding a central database</li> <li>• Conformance Questionnaires and CHAS Accreditation Certificates – holding on a central database</li> <li>• General advice and recommendations from suppliers meetings disseminated to Schools</li> </ul> <p><b>GDPR (General Data Protection Regulations) Support:-</b></p> <ul style="list-style-type: none"> <li>• Standardising systems for Schools including a data mapping template</li> <li>• Encouraging the sharing of good practice through group meetings</li> <li>• Standardising Policies and Contracts</li> <li>• Investigating staff training options with a view to developing a bespoke online module for schools</li> </ul> <p><b>CPD for School Business Managers through:-</b></p> <ul style="list-style-type: none"> <li>• An annual conference which brings internal or external providers / expertise in to train or advise SBM's in areas where further information is required or where my research into changes in legislation that affect Schools can be explained and disseminated.</li> <li>• Half termly regional meetings where training or information is provided, Supplier Meeting information is disseminated, and facilitating the SBMs to reflect on their practice to help them develop professionally.</li> <li>• Any other training requirements as identified e.g. GDPR awareness training provided by a solicitor to Schools.</li> </ul> <p><b>Other Support Provided:-</b></p> <ul style="list-style-type: none"> <li>• Documentation to support website checklists ensuring compliance with statutory obligations</li> <li>• Documentation to support maintenance checklists for statutory testing obligations</li> <li>• Documentation to support Policy compliance with legal obligations</li> <li>• Health and Safety Inspection support in advance of the inspection</li> </ul>

	<ul style="list-style-type: none"> <li>• Liaison with NTC departments on behalf of all Schools such as Audit, Health &amp; Safety and Procurement</li> <li>• Promotion of NTC / NEPO contracts to Schools</li> <li>• Single point of contact for liaison to avoid a lot of duplication of work by each School</li> <li>• Maintenance of email support network</li> <li>• Sharing of good practice</li> </ul> <p>The service has also allowed for some capacity to support 2 Schools where Business Manager support was / is needed</p>
what schools would/ would not receive if this additional funding was not available (*)	<p>In general all of the above which Schools currently receive, they would no longer get.</p> <p><b>Procurement Support</b> Schools would be able to ask the Procurement Team for some general advice but they would need to undertake all work themselves including all supplier meetings, tendering, quotation work, compliance questionnaires etc. The Procurement team are governed by the contracts they have in place and would have to recommend these contracts only.</p> <p>Any tenders are required to be processed using the NEPO portal which Schools do not have access to and the Procurement Team do not have the capacity to undertake this work on behalf of Schools. The Schools Procurement Officer is provided with access to this portal to undertake tenders on behalf of the Schools.</p> <p>With Brexit coming, again the Procurement team would be able to provide some advice around changes to procurement legislation if they are requested to do so.</p> <p><b>Contractor Support</b> Schools would need to undertake this work themselves and each hold their own documentation as there will be no central database or updated checks made (compliance questionnaires, IR35 declarations). Again the Schools Procurement Officer has access to the CHAS database to check compliance which Schools would not have access to unless they paid into the service. Schools will need to meet with all suppliers individually to understand market changes, find prospective suppliers and understand market pricing.</p> <p><b>GDPR</b> The Schools will receive some support from the Local Authority around GDPR if they sign up to the SLA which is restricted to a fixed number of hours support only.</p> <p><b>CPD</b> There is currently only statutory training for SBM's provided by the Local Authority around health &amp; safety / first aid / fire warden training etc. There is no professional CPD offered to support School Business Managers and hence Worked to support this through the means highlighted above to help develop their professional capability.</p> <p><b>Other Support</b> There is support from the health and safety team around statutory documentation and support prior to an inspection which Schools can access.</p> <p>There would no longer be a single point of contact for Schools and there will be a lot of duplication – each School will be doing the same as the others.</p> <p>There will no longer be the support of regional meetings and local groups of Schools</p>

	<p>getting together to procure jointly, share good practice and support each other, unless each area determines a means to continue this practice. Currently even if Schools can't make a meeting they are still shared into the notes from the meetings to ensure that they receive all the information shared.</p> <p>There will no longer be the capacity to support any Schools through any periods of change e.g. where the Business Manager leaves or has an extended absence.</p>
Note of any statutory provision(s) within the service area.	<p>EU Procurement Law</p> <p>GDPR</p> <p>IR35</p>
Additional Information	<p>The funding provided is used to support salary only. During this financial year post holder has been supporting a High School to run an EU tender which is currently in progress through the NEPO Portal. This is a lengthy process which will take up to 5 months to complete.</p> <p>Post holder provides advice to Schools on an-ongoing basis on a range of subject areas, and in particular this year has been around Data Protection and the GDPR. Also looking into alternative Energy Supply options at the request of Schools. Supported a primary school in seeking contractors to undertake a variety of works in School. Continually updating and reviewing the contractors list which supports schools in identifying approved contractors they may wish to utilise.</p> <p>Looking to support schools through Salix applications for loans for energy efficient improvements to School premises, looking at washroom services contracts, new contractors in general, World Start a Heart Day, shredding services and refurbished computer options.</p> <p>Post holder undertaking a secondment as a Data Protection Officer for 6 schools / sites which will bring provide for a saving of c£15,000 before training costs have been deducted.</p>

## Appendix B

<p style="text-align: center;"><b>NORTH TYNESIDE COUNCIL in Partnership with ENGIE – Procurement Team</b></p> <p><b>Why us:</b></p> <p>The NTC/ENGIE procurement team can offer dedicated support to Schools to help with all aspects of procurement. Schools gain the benefit of procurement expertise delivered by a number of procurement managers and category managers. This expertise will allow schools to gain value for money through economies of scale, use of frameworks and tender expertise.</p>	<p><b>Contact us:</b></p> <p>Denise Pearson Engie Procurement North Tyneside Council Quadrant East Newcastle on Tyne NE27 0BY 07817 574538</p>
<p><b>Benefits:</b></p> <p>Category managers have market expertise to allow Schools to benefit from this understanding.</p> <p>Knowledge of available Frameworks and contracts will speed up the contracting process within schools to gain greater efficiency. The team can also support Schools to tender for goods and services directly when frameworks or contracts are not readily available. Our dedicated local service will provide advice and expertise within schools with all aspects of procurement to ensure schools are able to procure items in an easy, seamless, compliant route.</p> <p>Compliance of procurement process and Public Contract regulations will ensure schools have full compliance with EU Regulations and contract standing orders.</p> <p>Dedicated support to allow Head teachers and Governors to produce compliant processes within schools and coaching to ensure users are able to use the system easily.</p> <p>You will get a dedicated manager to coordinate with the team and schools to ensure seamless provision of service and continuity of care.</p>	
<p><b>What people have said about our service:</b></p> <p>‘All expectations are always met and I have a fantastic working relationship with the whole team.’</p> <p>‘Already exceed expectations, knowledgeable, friendly, extremely helpful I know I can even ring for assistance in pointing me in other directions – Fantastic, 1st rate team’</p> <p>‘I have always had a very positive experience from the team, they have been so helpful and very patient guiding me through complicated areas.’</p> <p>‘I get a fantastic service’</p>	<p><b>Communication</b> <b>Browse our resources</b></p> <p><a href="http://intra.northtyneside.gov.uk/category/12/procurement">http://intra.northtyneside.gov.uk/category/12/procurement</a></p>