

Briefing note

To: Schools Forum

Author: Christina Ponting (David Baldwin)

Date: 24th April 2019

Purpose of the Paper:

Information	√
Consultation	√
Decision	√

Title of Briefing: Review of the Role of the Schools Procurement Officer

Background:

Schools Forum historically made a decision to appoint a Procurement Officer which directly supported Schools. The funding for this post was allocated from Headroom funds. Each year since the post has been in place Schools Forum have received an update/ presentation and latterly this report has been factored into the annual review of funding allocations to North Tyneside Council (and/ or their Partners) or other Service areas. These reports are received by Schools Forum in July of each year and Schools Forum are able to request further information/ updates before making a final decision in December of each year to allocate funding or not.

Current Position:

The post is now vacant due to the previous post holder securing a post in a school. Schools Forum have the option to determine if they wish to continue with this post or not and if they wish to continue with this post under what remit/ role description/ appointment factors do they wish to have in place.

The current post is funded circa £25,000 per annum and the post is part-time/term time only. The post holder was employed directly by a host school who oversaw the employment relationship, training, etc. The last report for this role was presented to Schools Forum on the 11th July 2018 is attached for reference / to give clarity on what the role has delivered / undertaken.

Recommendations:

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

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 Head room funding)

who would in the event it was required be eligible to vote on any recommendations/ decisions?

1. Do Schools Forum believe there is a continued need to have this post in place.
2. If this is the case –
 - a. do you wish for a replacement post to operate as the previous post has?
 - b. Are you happy for the existing host school to continue or would another school like to take on this role/ responsibility?
3. If this is not the case – do Schools Forum recommend
 - a. the funds are used in another way? e.g. to provide annual training/ refreshers to Schools on Procurement to schools
 - b. the funds are returned to Headroom funds to be allocated via those means?
 - c. other options/ suggestions/ ideas?

REPORT O

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>Procurement Support:-</p> <ul style="list-style-type: none"> • General procurement advice • Tendering support (manage the process on behalf of the school) • Analysis of terms and conditions prior to a School signing any contract to help them understand the commitment • Contract advice and support • Contractor advice and support at meetings • Benchmarking on spend areas • Quotation requests undertaken on behalf of schools • Legal advice offered on procurement • Group procurement undertakings • Meeting with current and prospective suppliers / contractors on behalf of schools and disseminating information. <p>Contractor Support:-</p> <ul style="list-style-type: none"> • Collating IR35 declarations and holding a central database • Conformance Questionnaires and CHAS Accreditation Certificates – holding on a central database • General advice and recommendations from suppliers meetings disseminated to Schools <p>GDPR (General Data Protection Regulations) Support:-</p> <ul style="list-style-type: none"> • Standardising systems for Schools including a data mapping template • Encouraging the sharing of good practice through group meetings • Standardising Policies and Contracts • Investigating staff training options with a view to developing a bespoke online module for schools <p>CPD for School Business Managers through:-</p> <ul style="list-style-type: none"> • 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. • 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. • Any other training requirements as identified e.g. GDPR awareness training provided by a solicitor to Schools. <p>Other Support Provided:-</p> <ul style="list-style-type: none"> • Documentation to support website checklists ensuring compliance with statutory obligations • Documentation to support maintenance checklists for statutory testing obligations • Documentation to support Policy compliance with legal obligations • Health and Safety Inspection support in advance of the inspection

	<ul style="list-style-type: none"> • Liaison with NTC departments on behalf of all Schools such as Audit, Health & Safety and Procurement • Promotion of NTC / NEPO contracts to Schools • Single point of contact for liaison to avoid a lot of duplication of work by each School • Maintenance of email support network • Sharing of good practice <p>The service has also allowed for some capacity to support 2 Schools where Business Manager support was / is needed</p>
<p>what schools would/ would not receive if this additional funding was not available (*)</p>	<p>In general all of the above which Schools currently receive, they would no longer get.</p> <p>Procurement Support 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>Contractor Support 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>GDPR 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>CPD There is currently only statutory training for SBM's provided by the Local Authority around health & 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>Other Support 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>