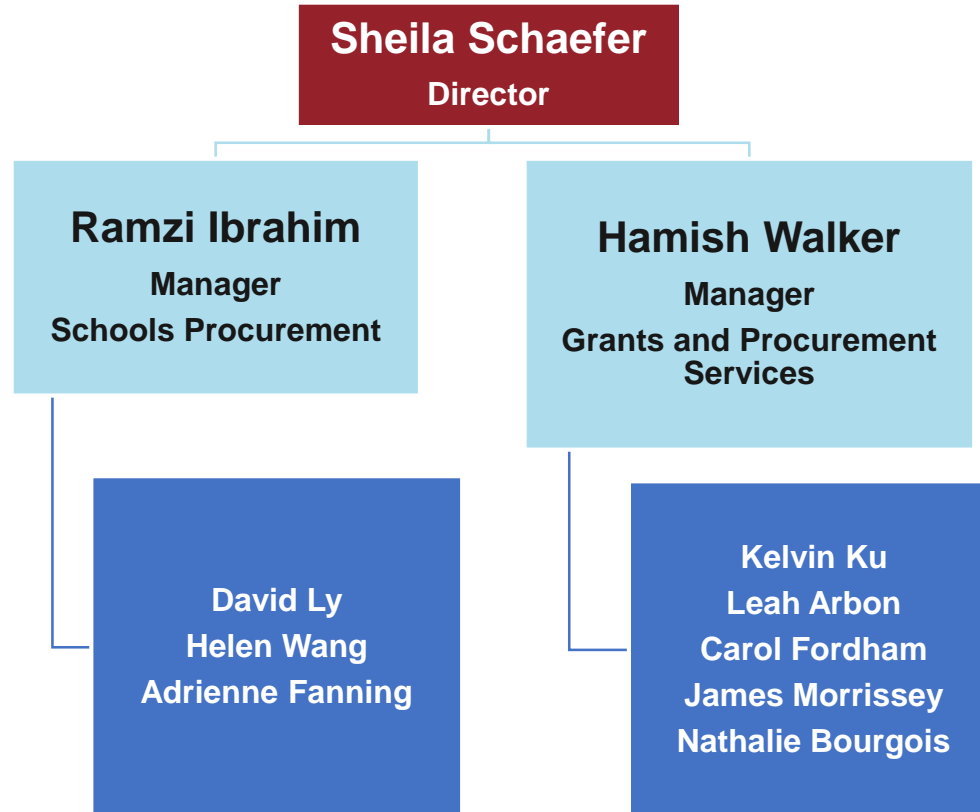


Schools Procurement Branch (SPB)

THE SCHOOLS PROCUREMENT BRANCH



SCHOOLS PROCUREMENT BRANCH

Schools Procurement

- School Procurement Policy (Procedures, Tools and Templates)
- Schools web-based portal (Resources)
- Schools Procurement helpdesk accessible via email
- Fit for purpose procurement training for relevant schools staff
- Develop procurement strategies and market engagements (e.g. tenders) for select categories of spend

Grants and Procurement Services

- Gifts, Benefits and Hospitality (Policies, Quick Guides, Register)
- 'Thanks is Enough' approach
- Grants
- Fleets
- Travel
- Sponsorship

WHY IS PROCUREMENT IMPORTANT?

Key benefits of effective procurement:

- Improved financial management through improved planning of procurement expenditure
- Ensuring continuity of supply of goods or services
- Not paying too much for goods/services

When done correctly, procurement can:

- Deliver financial and non-financial benefits to your school
- Ensure that school expenditure is delivering good value for money
- Help your school to achieve its objectives

Ministerial Order

- Schools Procurement Policy and Procedures implemented in 2017
- Changes the constituting order of school councils

SCHOOLS PROCUREMENT TEAM

SCHOOLS PROCUREMENT TEAM

- Small group of procurement specialists
- One-stop-shop for schools to get advice and guidance
- Online training (procurement essentials and contract management)
- Consolidated advice from several areas across DET
- Constantly review categories of spend = opportunities for savings
- Help with end-to-end purchasing for selected items
- **Schools retain autonomy over your purchasing decisions**

THE SCHOOLS PROCUREMENT PORTAL

Schools procurement policy, templates, tools, guides, training

The screenshot shows the 'SCHOOLS PROCUREMENT POLICY AND PROCEDURE' page on the Victoria State Government website. The page has a teal header with the Victoria State Government logo and a search bar. A navigation menu includes 'NEWS', 'MY WORKSPACE', 'STRATEGY & LEADERSHIP', 'STRUCTURE & GOVERNANCE', 'OUR POLICIES', and 'SUPPORT & SERVICES'. The breadcrumb trail reads: 'Support and Service (Schools) > Procurement, Funding, Travel and Gifts > Procurement > Schools Procurement Policy and Procedure'. The main content area features a large orange banner with the text 'Procurement policy and procedures for schools'. Below this is a section titled 'On this page' with a bulleted list: 'Schools procurement policy and procedure', 'Pathways to purchasing', 'Advice and assistance', and 'Schools procurement training'. The main heading 'SCHOOLS PROCUREMENT POLICY AND PROCEDURE' is followed by 'INFORMATION FOR SCHOOLS'. To the right of the heading is a 'Saved to Workspace' status with icons for print and email. A sidebar on the right contains 'Key Policies' (with a link to 'Procurement') and 'Related Topics' (listing 'Department Managed Categories', 'Schools Procurement Tools and Templates', and 'School Purchasing Card'). At the bottom, there is a section titled 'Schools procurement policy and procedure' with a paragraph about the Schools Procurement Branch (SPB) and two links: 'Schools Procurement Policy' and 'Schools Procurement Procedure'.

SCHOOLS PROCUREMENT POLICY AND PROCEDURE ✓ Saved to Workspace

INFORMATION FOR SCHOOLS

Procurement policy and procedures for schools

On this page

- Schools procurement policy and procedure
- Pathways to purchasing
- Advice and assistance
- Schools procurement training

Schools procurement policy and procedure

The Schools Procurement Branch (SPB) has been established in the Department to provide a single and consistent interaction for schools in relation to procurement.

To read the policy, see: [Schools Procurement Policy](#)

To read the schools procurement procedure document, see: [Schools Procurement Procedure](#)

Key Policies

- [Procurement](#)

Related Topics

- [Department Managed Categories](#)
- [Schools Procurement Tools and Templates](#)
- [School Purchasing Card](#)

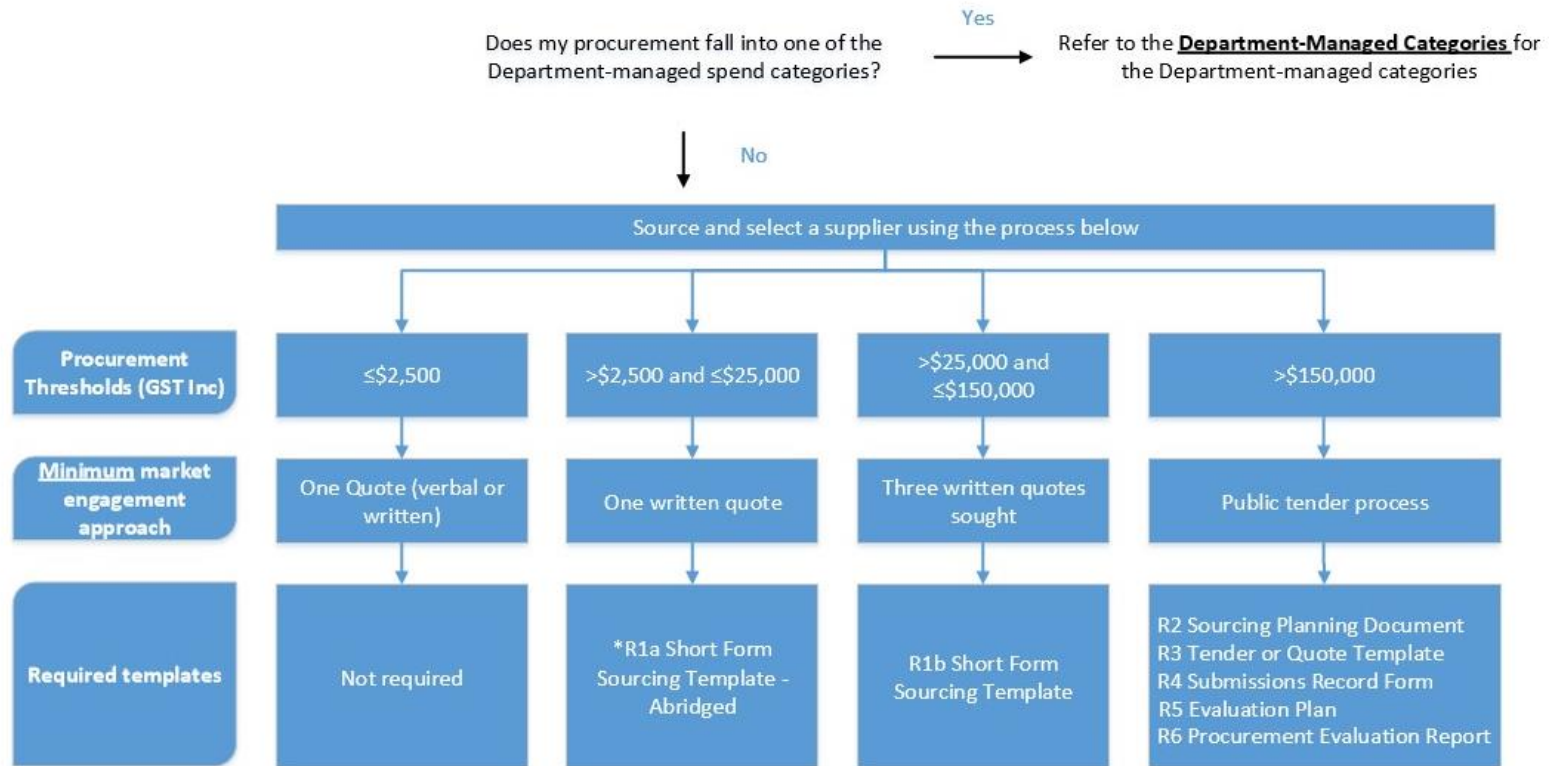
PROCUREMENT THRESHOLDS HAVE NOT CHANGED

| Procurement Thresholds | Minimum Market Approach |
|-------------------------------|---|
| ≤ \$2,500 | One quote (either verbal or written) |
| > \$2,500 and ≤ \$25,000 | One written quote |
| > \$25,000 and ≤ \$150,000 | Three written quotes sought |
| > \$150,000 | Tender process |

What is new?

A refreshed set of templates to help support your thinking and meet the documentation requirements for Departmental approvals.

PROCUREMENT PROCESS



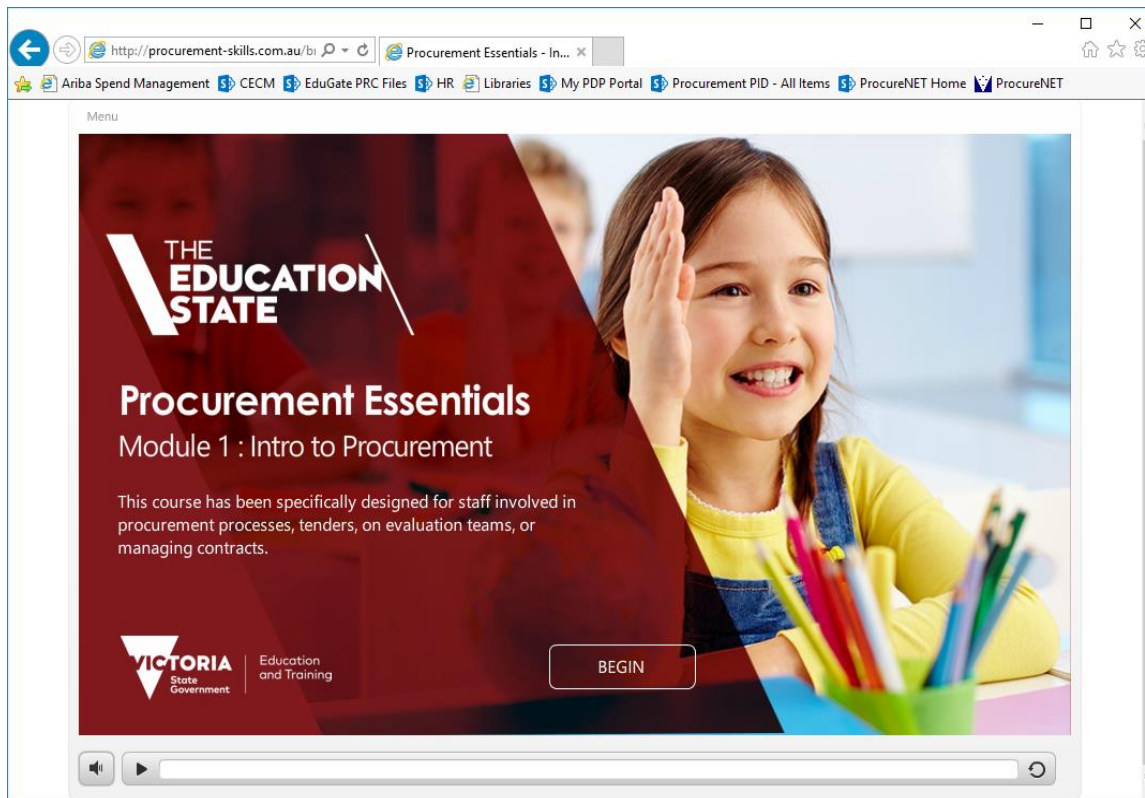
Contact the Schools Procurement Branch when required for any queries relating to any procurement activities.
Schools must retain documentation (e.g completed templates) for all procurement activities

*This document is optional for a single one off purchase. However, it should be used where multiple purchases are expected to be made from the same supplier or when a supply arrangement with a contract document is entered into.


ONLINE TRAINING

Contract Management and Procurement Essentials training to provide an overview of things to consider when buying goods and services is available via:

[Support and Service \(Schools\)](#) > [Procurement, Funding and Travel](#) > [Procurement](#) > Procurement Procedure



FACE TO FACE TRAINING

[Home](#)[About Us](#)[Professional Learning](#)[Leadership Initiatives](#)[Alumni & Events](#)[Facilities](#)[Resources](#)[Go](#)

You are here: [Home](#) > [Professional Learning](#) > [Course](#)

School Procurement

Module 11 of Strategic Management for School Leaders

This module provides an overview of procurement policies, process and risk within the school environment, supporting you to effectively manage your school's purchasing activities.

Procurement is the process of engaging with suppliers to provide goods and services. Done correctly, procurement can help your school achieve its objectives.

Audience

Principal Class, Business Managers

[Share 0](#)[Share](#)[Tweet](#)

[Overview](#)[Costs & Conditions](#)[Intake Dates & Apply](#)

Course Structure


Developed by the Schools Procurement Branch, this two-hour workshop uses presentations, discussion, case studies and group activities to equip you with knowledge and skills to effectively manage your school's purchasing activities.

This is just one module of the Strategic Management for School Leaders suite. To learn more about the suite visit the [Strategic Management for School Leaders](#) page.

Learning Outcomes

By completing this module you will develop an understanding of:

- procurement principles and thresholds
- understanding needs and undertaking market analysis
- market engagement methodologies and supplier selection
- Purchase to Pay process and Contract Management



At a glance

Contact
David Ly (Regional)
Schools Procurement Branch
03 4113 7466

Anna Rentschler (Bastow)
Course Coordinator
03 8199 2955

Career Stage
Principal Class

Course Code
SPSMM

FACE-TO-FACE TRAINING

Future Training

Face to face training will continue to be delivered for the remainder of 2019.

Planned dates and times are available through the Bastow website but are also outlined below:

| Term | Date | Location |
|------|----------------------------|-------------------------|
| 1 | 20 March 2019 – 10.00am | Webex (online) |
| 1 | 28 March 2019 – 9.00am | Bastow, North Melbourne |
| 2 | 14 May 2019 – 9.30am | Berwick |
| 2 | 16 May 2019 – 1.00pm | Keilor |
| 2 | 30 May 2019 – 10.00am | Greensborough |
| 2 | 25 June 2019 – 1.00pm | Benalla |
| 3 | 25 July 2019 – 10.00am | Bendigo |
| 3 | 20 August 2019 – 9.30am | Frankston |
| 3 | 18 September 2019 – 9.30am | Glen Waverley |
| 4 | 7 November 2019 – 9.00am | Bastow, North Melbourne |

When dates are confirmed and venues booked, details can be reviewed at the [Bastow](#) website.

Note: More dates can be made available based on demand.

SPONSORSHIP

Definition - Sponsorship

- Sponsorship is the purchase of rights or benefits, including naming rights, delivered through association with the sponsored organisation's name, products, services or activities. The rights or benefits typically relate to the sponsor's reputation, management or communication objectives.

A sponsorship is not:

- a grant, including money, goods or other benefits provided to the recipient for a specified purpose, but with no expectation of attaining rights or benefits as outlined above
- a bequest that has no obligations on the school and offers little or no rights or benefits to the provider
- the sale of advertising space, editorial comment or advertorials

Acknowledgement

- The level of acknowledgement provided to sponsors should be consistent with the level of sponsorship

Case studies and FAQ *(once ready for release)*

RESOURCES

For policy, procedures and online training visit:

[Support and Service \(Schools\)](#) > [Procurement, Funding and Travel](#) > [Procurement](#)

For any enquiries, you can email us at:

schools.procurement@edumail.vic.gov.au

Registration for Face to Face training:

<https://www.bastow.vic.edu.au/professional-learning/course?eventtemplate=263-Strategic-Management-for-School-Leaders>

GRANTS AND PROCUREMENT SERVICES TEAM

GRANTS

A key process for DET providing funding to external organisations for work performed in and around education (although sometimes resulting in partnership with schools).

- DET Grants policy – provides a general definition of a grant:
‘Discretionary funding provided to external individuals or organisations for a specified purpose directed at achieving goals and objectives consistent with government policy, where the grant recipient is selected on merit against a set of criteria’.
- A range of exclusions (including direct funding to schools) which is provided through the School Resource Package and targeted funding.
- Examples of Grants provided to external parties/individuals:
 - Murdoch Children’s Research Institute for the Childhood to Adolescence Transition Study
 - Comitato Assistenza Italiani (COASIT) - the Italian Language Assistance Program
 - The Teacher Learning Network - Professional Learning for CRTs program
 - Ethnic Community Council of Shepparton for the Social Cohesion through Education program

TRAVEL

- [Travel Policy - Information for Schools](#)
- [School Staff Travel Applications website](#)
- This should be read in conjunction with the appropriate [Travel Rules of Use](#) (School based staff) document.
- The Policy and Travel Rules apply to:
 - Corporate staff
 - Designated Portfolio Entity staff
 - School-based staff, and
 - Staff accompanying students on school trips and excursions
- Domestic travel and International travel – a different [process is followed for each](#)
- [Regional Travel Registrars](#) – contact details for each region
- [Corporate Travel Management \(CTM\)](#) – the government appointed travel management company (SPC) used to book flights and accommodation.
- [Register with CTM](#)

TRAVEL

Travel Rules of Use document

| | I need to undertake travel that requires | | | | | | |
|----------------------------------|--|--|--|--|--|--------------------------------|-----------------|
| Travel type | International travel | Inter-state travel (more than five consecutive nights) | Inter-state travel (five consecutive nights or less) | Intra-state travel (more than five consecutive nights) | Intra-state travel (five consecutive nights or less) | Day trip | See Section 4 |
| Traveller: Principal | Deputy Secretary (RSG) approval | Regional Director approval | | | | No 'system' approvals required | See Section 4.2 |
| Traveller: School Council member | | Principal approval | | | | | |
| Traveller: All other staff | | | | | | | |
| Excursions | School Council(s) and Regional Director approval | | | | | Principal(s) approval | See Section 4.3 |
| Booking timeframes | Bookings 3 weeks prior | Bookings 2 weeks prior | Bookings ASAP | | No bookings required | See Section 5.1 | |
| System approvals required | TRA required | | | | TRA not required | | See Section 4.1 |
| Reporting requirements | Post-travel report required | | Post-travel not report required | Post-travel report required | Post-travel report not required | | See Section 9 |

GIFTS, BENEFITS AND HOSPITALITY

- [Gifts, Benefits and Hospitality Information for Schools](#) website
- The Policy applies to all staff (including members of the Teaching Service), School Councillors, School Council employees, and contractors.
- [Declaration Form](#) and [Registry system](#) – declared within five days and approval required within 10 days.
- Case Studies – a good way to understand how the policy works and how it is applied to day-to-day happenings
- [‘Thanks is Enough’](#) approach – a simple thank you from businesses and suppliers is all we need.
- Conflict of Interest – potential, perceived or actual conflict, upon acceptance of offer.
- Supplier Code of Conduct - Supplier are not to offer gifts.
- Gifts of appreciation from parents and students to members of the teaching service – token gift if equal or under \$100.

GIFTS, BENEFITS AND HOSPITALITY

GIFTS, BENEFITS AND HOSPITALITY: QUICK GUIDE

| When and how you should declare an offer in the Registry System | | | | | Who approves the Recipient's proposed decision? | | |
|---|--|-------------------|-----------------------------------|--|--|--|---|
| Personnel | Offer type | Declare? | Declaration: Timing | Transfer to Department/school if accepted | Personnel | Offer Recipient | Authorised Delegate |
| All recipients | Token <\$50 | No | Not applicable | Ceremonial Gifts only | Corporate | VPS personnel up to and including Director and contractors | Assistant Deputy Secretary / Executive Director / Regional Director |
| | Non-token ≥\$50 | Yes | ≤ 5 business days from offer date | Mandatory transfer at \$500 or more | | Assistant Deputy Secretary / Executive Director / Regional Director | Deputy Secretary |
| | Victorian Government agency hospitality | No | Not applicable | Not applicable | | Deputy Secretary | Secretary |
| | Non-token ceremonial | Yes | ≤ 5 business days from offer date | Mandatory transfer of Ceremonial Gifts of any value | | Secretary | Deputy Secretary, Infrastructure and Financial Services Group |
| | SPAM | Yes (if accepted) | ≤ 5 business days from offer date | Not applicable | School-based | Members of the Teaching Service, administrative staff and school contractors | Principal |
| | Travel Request Authorisation with gift, benefits and hospitality | Yes | Prior to TRA submission | Not applicable | | Principal | Regional Director (Endorsed by Area Executive Director first) |
| Teaching Service | Token Gift of Appreciation ≤\$100 | No | Not applicable | Not applicable | | School Council member / employee / contractors | School Council, with offer recipient <i>in absentia</i> |
| | Non-Token Gift of Appreciation > \$100 | Yes | ≤ 5 business days from offer date | Decision at Authorised Delegate discretion at ≥\$500 from multiple sources Mandatory Transfer at ≥\$500 when offered by individual source | <ul style="list-style-type: none"> Authorised Delegates must make an approval decision within 10 business days of notification. Authorised Delegates are notified of, but are not required to make a declaration approval decision, for declined offers. | | |