

Procurement With Purpose Action Plan

February 2025



**Confederation
of School Trusts**

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Action Plan

1. Executive Summary

We have summarised the output from the Procurement with Purpose Workshop which was held at the recent Confederation for Schools Trust Finance and Operations Conference 2025. We have incorporated the feedback and observations from the workshop participants below, highlighting both short term tactical interventions and longer term strategic action which school trusts could consider taking.

We have included some case studies that demonstrate the positive financial, performance and sustainable outcomes that can be achieved by taking a more planned approach to procurement.

The Conference highlighted the significant financial challenges facing the sector today and how those challenges will grow rapidly over the coming years. Procurement in most school trusts is still relatively immature and not prioritised sufficiently to maximise the benefits school trusts could receive. The data we presented demonstrates this unequivocally with £550M spend analysed across more than 1M transactions and 42,000+ suppliers.

As a minimum we believe that school trusts should be targeting 5% year on year savings, significantly reducing their supply base, whilst obtaining improved supplier performance. This can and should be delivered in a sustainably and socially responsible manner. As an example, to date, our procurement service has created an additional 95 job and apprenticeship opportunities for our customers, whilst saving 10% of costs. Having the right blend of strategy and short-term tactical actions there is a tremendous amount of value and positive impact that can be unlocked through procurement.

Hopefully the following provides practical and helpful actions that all school trusts can benefit from.

2. Introduction

We hope the presentation and workshop was helpful and provided some useful pointers and an opportunity to briefly reflect upon how we approach procurement to obtain Value for Money and efficiency whilst seeking to have a positive social and environmental impact. We have drafted this summary which may also be useful for other conference attendees interested in finance and operations.

Both Paul and David are happy to share any experiences or to share some practical steps to help schools trusts in their approach to this broad and critical function. Within the Annex's are practical examples of Procurement with Purpose. We also provide a couple of very practical areas for schools trusts to support their strategy, planning and execution of procurement:

- Commercial Discovery which is a free service for all school trusts
- Benchmarking existing agreements
- Pre-competed contracting vehicles designed specifically for school trust

Thanks to everyone who provided feedback on the three areas highlighted, we have summarised the answers below. It will also be worth reading the summary within the slides that will be made available via CST.

3. Challenges

The feedback and some later discussions highlighted some of the major challenges that are facing school trusts in managing procurement effectively, these included:

- i. Challenge of balancing ethics, sustainability and budgets / Value for Money
- ii. Lack of available procurement / commercial resources
- iii. Lack of category expertise, e.g. IT and Digital, for most schools trusts it is difficult to have the breadth of expertise required, e.g. from construction, agency supply to MIS in often a single part-time person
- iv. How to establish whether DfE recommended contracts are ethical, sustainable and provide Value for Money
- v. Understanding where and when it is appropriate to enter into contracts
- vi. Lack of expertise and knowledge around markets, suppliers and their relative performance
- vii. Supplier and contract management capability and having the time effectively baseline and manage impact

4. What We Buy

What actions can you take as leaders to ensure what you are buying will deliver you Value for Money and have a positive societal impact?

The feedback from the session, we have split into tactical short term actions with a potential positive impact and longer term actions that will support developing a more strategic approach. We have tried to order them in terms of priority, and we have added some commentary as to how these steps can help:

Short Term Tactical Actions

- i. Manage low value orders more effectively by aggregation and standardisation – All of the data indicates all school trusts have far too many suppliers, too many transactions with the result that there are immediate opportunities for efficiencies and cost savings through aggregation. This requires behaviour change.
- ii. Reduce / manage demand – Minimise actual demand, extend the life of products, look for alternative solutions, this is both more sustainable and reduces costs. Whether that is over licensing of software to not receiving

- services being paid for e.g. from LA's or not managing areas such as waste segregation causing increased prices.
- iii. Stock audit ensuring only what is needed is procured – Only buy what is needed, e.g. share supplies across schools, have a clear returns policy for contracts.
 - iv. Use refurbished and recycled products – For many products refurbished or recycled equivalents can be bought 'as new', with the same warranties at 50-60% reduced costs. Better for the planet and the budget!
 - v. Use specialist procurement partner – This came from the workshop not us! If capacity and capability is an issue, consider how to address this, the Return on Investment should easily be more 5:1 especially in the first few years and in our experience significantly more.
 - vi. Understand what we are buying – Although this sounds very simple and obvious, most school trusts do not know what they are actually buying, from whom they are buying it from and at what unit prices. You can't manage efficiency and Value for Money without this baseline data, this is why we undertake Commercial Discoveries for all schools trusts we work with (see below).

Longer Term Strategic Actions

- vii. Procurement function strategy established and link this to specific contract management outcomes – This should be proportionate to the size of the school trust and total value of third party expenditure. It should be a simple set of strategic objectives, linked to school trust values, ways of working but acts as guiding principles for management and school trust leadership.
- viii. Have a clear sustainability policy on the products we buy and share with suppliers – This can be part of the procurement strategy or a separate but connected policy, there needs to be clarity on the nature of goods and services being bought, if there is an intent to buy more responsibly than that is more likely to happen.
- ix. Design tender / specification to include ethical standards – This can be more complicated and requires knowledge of product standards, however, will provide more sustainable outcomes, e.g. which electric devices use less electricity, removal of single use plastics, paper, wood, packaging from sustainable forests etc....
- x. Reduce food miles by using local products – Many catering service or food providers are tracking / increasing the use of local, regional and national suppliers, some providers will target local butchers and/or develop regional supply chains whilst maintaining quality and food safety standards.
- xi. LED lighting and other energy savings activity – Energy and water usage within school estates is both expensive and wasteful. Currently most school trusts do not optimise demand or collect basic management information to help make better decisions. Consolidate suppliers, minimise invoicing and ensure access to demand management information and then build strategies

- to reduce usage. High spend area so will have a large positive impact on budgets and the environment if undertaken well.
- xii. Supply staffing and use of local agency staff suppliers – This is a more difficult area, with very mixed performance from suppliers whether local or national suppliers. To effectively manage this area of expenditure requires both demand side actions, more granular and standardised management information from suppliers to ensure school trusts are obtaining the right quality of agency staff and can also take relevant workforce management actions.
 - xiii. Raise awareness of sustainable impact with colleagues and pupils – If we want to change behaviours and support demand and supply changes, whether that is not ordering products that aren't needed, changing eating habits or switching off lights and devices requires raising awareness, communication and changing behaviours for leadership and those directly responsible for ordering goods and services.

5. How We Buy

What actions can you take to improve how you are buying efficiently and allocate resources to critical areas of supply?

The feedback from the session, we have split into tactical short term actions with a potential positive impact and longer term actions that will support developing a more strategic approach. We have tried to order them in terms of priority, and we have added some commentary as to how these steps can help:

Short Term Tactical Actions

- i. More commercially minded and less accommodating – More commercial focus on managing suppliers, not accepting price increases or poor performance.
- ii. Consistent use of procurement resources – Linked to consolidation, and being more commercially minded, intervention in larger critical contracts, or longer term contracts. Proportionately but for say all contracts with an annual value in excess of £50K these should be commercially reviewed.
- iii. Collective aggregation of buying power within a school trust – Ensure there is a school trust wide approach, even if the plan is to use very local / micro suppliers, see each procurement intervention as a distinct project looking to balance the need of the school and school trust.
- iv. Contract length – Only enter into longer term contracts where there is clear justification, a strategic supplier, leveraging expenditure and suitable termination provisions. Read contracts avoid automatic renewals. Lots of short term actions to avoid unfavourable commercial and legal provisions.
- v. Communicate and train internal colleagues about buying processes – Ensure colleagues are clear about delegated responsibilities, are trained and understand the do's and don'ts of contracts.

- vi. **Benchmarking** – All contracts that have been in place for longer than 2 years should be benchmarked against the market to ensure that the school trust is getting best value when compared to the market, e.g. we have seen food and general products significantly rise and fall over the last 4 years. Have you seen your prices reduce?
- vii. **Collate bulk orders where possible and reduce unnecessary logistics and therefore cost and sustainability impact** – Most school trusts are multi-site so coordinating ordering and delivery schedules will reduce costs.
- viii. **Reduce transactional volume and costs** – Reduce all inefficiencies within the end to end process of contracting to payment and delivery.
- ix. **Centralised financial management with consolidated invoicing** – This is very dependent upon the culture of the school trust but a centralised and coordinated approach to budget setting, financial administration, use of Procurement-Cards (P-Cards), financial and commercial reporting etc... will all help with greater alignment and efficiency.

Longer Term Strategic Actions

- x. **Proactive, planned and coordinated procurements** – All school trusts should have a pipeline of planned sourcing and supplier / contract management for major areas of expenditure over a 12-month period, with scheduled procurement interventions.
- xi. **Use of technology in how we buy, e.g. use of Artificial Intelligence** – There is limited use of procurement technology within schools trusts even in the utilisation of current finance and budget management systems and initial steps would be to track key commercial metrics using existing systems and then develop an approach to areas such as contract management.
- xii. **Contractual terms and conditions** – This is resource and capability constrained, but basic training of key colleagues and certainly any colleagues who sign contracts is required. There are both markets and suppliers who are targeting schools for commercial gain and locking them into unsuitable contracts. It is also not sufficient to just enter into pre-competed framework contracts as terms can and are varied at a call-off level.
- xiii. **Collaborate with different school trusts to leverage spending power** – As we stated in the workshop, school trusts acting collaboratively have large spending power, but need to act together and this would help rebalance some of the existing commercial relationships within the sector.
- xiv. **Key Performance Indicators that are clear and monitored** – This is an important intervention, do not expect suppliers to perform or reduce costs without clarity of purpose and measurement and to be held to account for performance. However, keep these KPI's consistent and focused and relatively few in number matching the school trusts priorities.
- xv. **Scope 3 monitoring / manage carbon footprint** – More and more organisations are investing in monitoring Scope 3 emissions; this will reduce costs and support a more positive environmental impact. Build this into contracts where appropriate.

- xvi. Include sustainability criteria within tender documents and evaluation weightings – Too often in the public sector in general this is seen as an additional requirement. If core specifications are established building in sustainability into the core of the product or service this will deliver a much more sustainably focused response and will be core to the need and will not add to costs.
- xvii. Build in social value to the buying process and evaluation of supplier's responses – As part of the service and contracts we have put in place we have created job and apprenticeship opportunities that are additional the contracted outcomes and Value for Money. Suppliers will engage in positive social value initiatives if the contract length and value support that approach. This supports pupils and the local community.
- xviii. Use of carbon off-sets for example for travel on trips – This might be a little more challenging and carbon off-sets have a mixed track record. But the principle of reducing carbon impact to a minimal footprint and then seeking ways to mitigate what is left, whether using your own estate or a third party is an excellent principle.

6. Who We Buy From

What actions can you take to ensure you have suppliers that support your strategic outcomes in a sustainable and socially responsible manner?

The feedback from the session, we have split into tactical short term actions with a potential positive impact and longer term actions that will support developing a more strategic approach. We have tried to order them in terms of priority, and we have added some commentary as to how these steps can help:

Short Term Tactical Actions

- i. Identify existing suppliers and supplier capability – Provided this is undertaken with the most important suppliers (it is proportionate to resources available and potential supplier impact), establishing a stronger understanding of current supplier capability, how they approach sustainability and how they can support the school trusts short term objectives is likely to have a positive impact.
- ii. New supplier request management and control e.g. ask more structured and detailed questions before being on-boarded – To stop the further escalation of the number of suppliers and to tactically ensure new suppliers meet the school trusts needs and policies will support supplier consolidation. There should be clear guidance and policies over the approach and who is managing this process.
- iii. Communicate to colleagues which suppliers can be used, whether formal or informal contracts – If there are suppliers who have proven to be reliable and provide Value for Money ensure colleagues are aware. I would be cautious about stating they are 'approved' or even 'preferred' suppliers unless

- supported by very clear statements as to what that actually means and what due diligence has taken place.
- iv. **Use local suppliers to support local economy / community** – Similar to point iii. above, where there are proven local suppliers ensuring they are used and also put under more formal contracts is helpful. For new requirements or contracts consider whether the default position should be to source locally where this is legally permissible and also likely to meet other requirements such as supplier performance and Value for Money.
 - v. **Manage existing suppliers to deliver improved social value outcomes** – Where a school trust has contracted relationships and say 2-5 year contracts, there is no harm in asking suppliers whether they are prepared to offer social value outcomes directly related to the school trust objectives and requirements. The benefits of this will be speed of impact rather than waiting for contracts to come to end, many suppliers want positive discussions and engagement.
 - vi. **Remove Amazon** – For any supplier, whether for reasons of efficiency, performance / outcomes or poor Value for Money, it is perfectly reasonable for a school trust to remove that supplier or establish a policy of not using that supplier and enforcing that policy. For example, for suppliers who will not provide consolidated invoicing or supporting management information. Obviously if there is a formal contract in place, you should look at what your obligations are under that contract and termination rights etc... But many suppliers have no formal contracts with school trusts.

Longer Term Strategic Actions

- vii. **Supplier due diligence completed before suppliers are on-boarded and prior to entering into contracts** – This requires capability and capacity and an alignment with a school trusts procurement and sustainability strategies and policies. It needs to be proportionate to size of spend and potential impact and applied consistently.
- viii. **Approved supplier lists / or frameworks** – This is in many ways is similar to vii. above, most school trusts really refer to ‘approved’ as shorthand for legally compliant and make assumptions over what compliance looks like. Best practice requires a more formalised management approach and should support the school trusts strategic and operational objectives, any ‘approved’ or ‘preferred’ supplier has been legally procured (no assumptions should be made here), is delivering commercial value, is efficient, has clear KPI’s is being actively managed etc...
- ix. **Limit number of suppliers in each category** – For most categories of spend within school trusts there will be an optimal / sensible number of suppliers that should be used, e.g. electricity, supply agency staffing, workplace solutions, IT / Digital etc... Any category strategy should include an approach that suggests what the optimal number of suppliers should be, this may be 5 -10 suppliers for say ground maintenance if your estate is geographical spread as an example, but it should be planned not an inherited position.

- x. Limit number of suppliers within a school trust – Overall each school trust should understand they 30-40 key strategic suppliers it wants to form a longer term contracting relationship with and then identify in each spend area / category what additional suppliers may be needed for one-off, special requirements. It is also worth considering whether for these generally low value areas the use of P-Cards or similar.
- xi. Culture changes to prioritise ethics and sustainability – Raising awareness, education, training and case studies of best practice and the importance to making more positive sustainability and socially aware choices are important. Procurement approaches if undertaken well can impact the entire supply base and supply chain, so can act as an amplifier and accelerator of positive change.

7. How we can help

We have outlined a number of areas we currently support school trusts to help them deliver improved procurement outcome sin a sustainable and ethical manner.

6.1 Commercial Discovery

Our Commercial Discovery is designed to help school trusts identify cost saving opportunities, streamline procurement processes, and embed sustainability and social value into procurement decisions.

This free of charge, data-driven assessment provides a clear roadmap for financial efficiencies, improved governance, and long term procurement strategies.

- i. We conduct a deep dive into non staffing spend data, contracts, and operational practices to identify inefficiencies, cost saving opportunities, and compliance risks.
- ii. We compare your procurement performance against best practice standards, ensuring your Trust is leveraging collective buying power and driving value for money.
- iii. We align procurement recommendations with the United Nations Sustainable Development Goals (SDGs) and Gatsby Benchmark supporting MATs in achieving carbon reduction, social value impact, and ethical supplier engagement.
- iv. We provide a detailed report outlining tangible actions, tailored to your Trust's needs, including immediate savings, efficiency improvements, and a sustainable procurement strategy.
- v. We work alongside your leadership team, finance departments, and procurement specialists to ensure recommendations are practical, implementable, and aligned with Trust objectives.

6.2 Benchmarking

We have 10,000's of unit pricing data points from every competition we have managed across school trusts. This means we can very easily benchmark all

existing contracts to establish whether a school trust is obtaining Value for Money as well as whether the supplier is providing the level of performance expected.

Best practice for all organisations should include a formal price and performance benchmark of all large / important contracts as a minimum every 2 years, but more frequently if there are constant price changes or performance is not meeting expectations or KPI's included within the relevant contract.

In most contracts there will be provisions to review performance and potentially pricing, we would certainly advocate for a pro-active commercial review of contracts and certainly not to wait for the end of contract before undertaking any commercial intervention.

6.3 Pre-competed Contracting Vehicles

Pre-competed Contract Vehicles, such as our Best Value Frameworks and Sustainable & Ethical Dynamic Purchasing System (DPS), offer a streamlined, fully compliant route to market, ensuring school trusts can achieve best value, reduce administrative burdens, and embed sustainability into purchasing decisions.

- i. Our Best Value Frameworks and DPS provide pre-approved suppliers, ensuring quality, compliance, and value for money without the need for a full tendering process.
- ii. Schools can save time and resources by calling off contracts directly through our pre-competed vehicles, reducing procurement complexity and administrative overheads.
- iii. By leveraging collective buying power, our Best Value Frameworks help schools reduce costs through bulk purchasing and strategic supplier relationships.
- iv. Suppliers are assessed against environmental, ethical, and social impact, ensuring procurement decisions align with sustainability and local community goals.
- v. Our pre-competed solutions ensure all procurement meets legal, financial, and regulatory standards, mitigating compliance risks for school trusts.

8. For more information, contact:



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Annex A: Workplace solutions bring sustainable efficiency and savings

Workplace solutions brings sustainable efficiency & savings



- School costs are rising faster than general inflation, with estimated cost increases of 7%.^[1]
- HEART Academy Trust reprocured their workplace solutions through our single-supplier Workplace Solutions Best Value Framework.
- Reduced administrative burdens have improved productivity ensuring more time spent on core educational priorities.
- Through our single-supplier best value framework, HEART was able to increase productivity and decrease their climate impact.



Reduced the number of suppliers from 31 to 1, fostering strategic relationships that enhance service delivery

Achieved an 11.1(t) decrease in CO2 emissions from reduced deliveries, equivalent to the carbon absorbed by approximately 555 trees growing for one year ^[2]



Supported continuous improvement with robust KPIs and monthly management reports, ensuring ongoing optimisation and



21% savings, equivalent to a teaching assistant



Implemented a zero to landfill system for managing waste packaging, ensuring it is reused or recycled, further contributing to environmental sustainability

413 invoices reduced to 12 annually, streamlining administrative processes, increasing productivity and ensuring more time spent on core educational priorities



“An important part of our sustainability strategy is our transition to partnering with suppliers who share our ambitions of environmental stewardship and social responsibility. We believe collaborating with like-minded suppliers will help foster innovation in sustainable practices and products, leading to more efficient use of resources and reduced waste”

References:

[1] replace with link to library

[2] <https://www.gov.uk/government/publications/woodland-grants-and-incentives-overview-table/woodland-grants-and-incentives-overview-table>

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Annex B: MIS transforms education efficiency and performance

MIS transforms education efficiency and performance

- Two thirds of teachers reported that they spend over half of their working time on tasks other than teaching. This includes general administrative tasks, which 75% of teachers felt took up too much of their time. ^[1]
- This Multi-Academy Trust (MAT) recognised the need to increase productivity and wanted to implement a unified Management Information System (MIS) to streamline operations and improve frontline education outcomes.
- Productivity and financial savings were reinvested back into frontline education resources.

70% saving against the Trust's current MIS spend over 7 years.
Redistributing savings towards direct education priorities



Workplace placement schemes at Bromcom were offered to pupils, supporting their future career readiness and providing practical experience in a professional environment

The new system reduced the administrative workload by integrating automated workflows and simplifying data management tasks, directly addressing the key issue of excessive non-teaching workloads



Bromcom's partnerships with universities actively support pupils in pursuing teaching careers, helping to address the national teacher shortage and providing a direct pathway from education to employment

The Trust has transitioned from using 4 individual Management Information Systems to a unified portal was established, significantly boosting engagement levels among pupils and guardians



“The team have been a great help and support to us in getting a complex procurement specified, documented and out to market. Their knowledge and experience, in particular pointing out the pitfalls and market sensitivity in the area we were looking to procure from, was invaluable. We are very pleased with the outcome and achieved our objectives with the support of the team every step of the way.”








References:
[1] <https://schoolsweek.co.uk/key-findings-from-the-dfes-leaked-workload-report/>

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Annex C: Healthy eating supporting educational outcomes

Healthy eating supporting educational outcomes

- 4 million children go to school on an empty stomach or have inconsistent access to nutritious meals at home. ^[1]
- Reprocurring catering services for this Multi-Academy Trust achieved significant savings.
- The MAT reinvested savings into a Breakfast Club, this ensures that every student has the opportunity to start their day with a meal.

 <p>Achieved 29% savings over a 5-year contract period across all menu items</p>	<p>Standardised a nutritional menu across 11 schools, ensuring consistent access to healthy meals for all pupils</p> 
 <p>Reinvested supplier rebates into new breakfast clubs, ensuring every pupil begins their day nourished and ready to embrace the morning's learning opportunities</p>	<p>Implemented controlled supplier management and an improved delivery schedule, enhancing operational efficiency</p> 
 <p>Introduced an online ordering system to provide better visibility on orders and manage stock control, enhancing operational compliance</p>	<p>Set goals to achieve a minimum of the Bronze Soil Association Accreditation during the contract period, demonstrating a commitment to sustainable and healthy</p> 
 <p>Conducted staff kitchen efficiency courses, resulting in an additional 8–10% savings</p>	<p>Completed the procurement within 17 weeks, simultaneously with other school term projects, ensuring the school was fully prepared well in advance of the contract start date</p>









References:

[1] <https://pressreleasehub.pa.media/article/hungry-school-children-at-disadvantage-in-learning-risk-missing-out-on-dream-jobs-4796.html>

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Annex D: Value Match Sustainability & Social Value Impact

Value Match Sustainability & Social Value Impact 

 <p>39 full-time equivalent (FTE) employment opportunities</p>	 <p>56 Number of apprenticeship opportunities (Level 2, 3, and 4+) created or retained</p>
 <p>147 Number of training opportunities (Level 2, 3, and 4+) created or retained under the contract, other than apprentices</p>	 <p>1034 hours protecting and improving the environment</p>
 <p>2401 hours of learning interventions</p>	 <p>2252 hours to deliver subject matter training or raise awareness</p>
 <p>390 hours to support embedding improvements into ways of working and driving efficiency or increase productivity</p>	 <p>197 hours supporting local community integration such as volunteering or community lead initiatives</p>

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