



Schools financial health checks: selecting a supplier

This document aims to help schools select a supplier from the schools financial health check supplier directory.

The schools financial health checks supplier directory is not a complete list of organisations that provide financial support to schools. For example, you might have identified other local schools or sector organisations, unions, consultants, accountancy companies or networks of school business managers and finance directors. However, you may find this guidance and the information set out in the health checks framework useful for selecting a supplier not listed on the supplier directory.

List your requirements

You should agree with school leaders and governors what kind of support would be most beneficial for the school. The financial health checks structure could provide a framework for this conversation.

The next step should be to list your requirements which should set out what you want the supplier to do. You could base this purely on the financial health checks or you could also include any requirements you have in addition to the health checks. If you are asking more than one supplier to bid for the work you should consider how you will assess the bidders. This should cover both costs and quality of the information provided by the suppliers. Some suppliers will be able to provide their services for a low or no cost. Other suppliers may charge for their services.

Please note that suppliers included in the directory have declared that the information they provide is correct. The Department for Education (DfE) make no further checks on suppliers.

The questions for suppliers set out some of the areas you could cover in both your requirements and your assessment criteria.

Make a shortlist

Your shortlist should take into account the experience of suppliers, their qualifications, capacity to deliver within required timescales, and cost. We have given suppliers the opportunity to summarise this information in the directory.

There may be instances where you can choose a single supplier without going through a tendering process. In this instance, we still recommend that schools produce a set of requirements, detailing what the service should include and the timescale for this to happen.

Identify a preferred supplier

If you need or want to run a competitive process then we recommend that you select 3 or more suppliers and invite them to set out how they would meet your requirements and to provide a quote.

You should send your requirements and assessment criteria (including questions if applicable) to each of your shortlisted suppliers. You should provide a timescale for responses and make it clear that you are running a competitive process.

You should give suppliers a reasonable time to ask questions. You should share your responses to questions with all shortlisted suppliers along with an anonymised version of the question.

You should also give suppliers a reasonable time to provide their completed tender response.

You can read more about school procurement example timelines.

Once you have identified your preferred supplier, you should follow your usual procurement procedures to draw up a contract or purchase order as appropriate.

Questions for suppliers

When considering your requirements and/or identifying your preferred supplier, you could ask:

- what other schools and trusts have you worked with?
- which person/people (“the health check team”) will deliver the services?
- how will the skills, knowledge and experience of the health check team be used to deliver the health check?
- how well do the members of the health check team know the education landscape and the challenges currently facing schools?
- how well do the members of the health check team understand the context and circumstances of my own school / trust?
- what form will the review take? How long will it take?
- how much will you charge?
- who would you need to speak to? How much of their time will you need?
- what information would we need to provide to you?
- what will your health check report include? How will this information be communicated to us (eg report, presentation)?
- do you include follow on guidance/help as part of the package price and if so what are the limits to this?