

**INVITATION TO QUOTE FOR THE
PROVISION OF INTERNAL AUDIT SERVICES
AT INMAT ACADEMY TRUST (EDUCATION SECTOR)**



Date: - 10/02/2026

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SECTION 1 – INSTRUCTIONS AND INFORMATION ON TENDERING PROCEDURES

1.1 Introduction

These instructions are designed to ensure that all quotes are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified.

Any request for clarification of these documents must be made by email to:

Dawn Chapman

Chief Financial Operations Officer

InMAT Academy Trust

Telephone: 01604 434600

Email: dawn.chapman@inmat.org.uk

The Academy Trust will respond in writing within five working days after receipt of any request for clarification.

The Academy Trust will not respond to any request for clarification which is received later than five working days prior to the quote return date.

You should treat all information contained in the Instructions to Interested Organisations as confidential except where you find it necessary to use quotes for the purposes of preparing your tender.

Quotes can be submitted electronically using the Forms of Quotes, Pricing Schedules and any information you are supplying to support your submission.

1.2 Tenure

The new contract with the successful Contractor will commence on the Effective Date will be for a period of three years.

1.3 Quality and Value for Money

The new Auditors/Accountants shall work with the Academy Trust to pursue the most cost-effective way to deploy resources for an efficient and accurate service.

1.4 Communication

Communication is with either Dawn Chapman, Chief Financial Operations Officer (CFOO) or Lorna Cooper, Trust Finance Manager (TFM).

Chair of the Financial Audit and Risk committee (FAR) – Nigel Corbett

1.5 Sustainability Policy

The Academy Trust is working to become a more sustainable organisation and wish their business partners to actively promote their policies and procedures.

These include but are not limited to:

- Eliminating hard copies wherever possible and using electronic communications and file systems (Office 365)
- Using Teams or other platforms for meetings and discussions to reduce mileage

1.6 Specific Objectives

The planning of the programme will be informed by the trust's risk register, external audit reports and decisions taken by the board.

The Internal Scrutiny provider takes the delegated authority on behalf of the board of trustees for examining and reviewing all systems and methods of control both financial and otherwise including risk analysis and risk management, and for ensuring the Trust is complying with the overall requirements for internal scrutiny.

Internal scrutiny programme will have financial control systems at its core and will include the evaluation of controls and some testing by a sample of transactions.

Key areas to be covered:

- Management Accounts reporting
- Payroll processes
- Financial controls and Compliance
- HR administration
- Operation – Estates/IT
- Asset Management

The Academy Trust recognises the importance of the accounts, internal and external audit service.

Whilst cost is important, the Academy Trust is looking to appoint a company demonstrating a culture of continuous improvement, solution led management style and an offer of best value for money.

In summary the principal objectives of this tender process are for the successful contractor to:

- Audit of internal controls – key areas three times a year (approved by the Trustees annually)
- Providing assurance on regularities
- Laws, regulations, policies, and procedures are adhered to
- Assuring operations are effective and efficient

1.7 Sites Included

INMAT was formed in April 2017 and currently has with 13 Primary academies with over 3000 pupils on roll.

School	Address
INMAT – Central Office	Unit 2 Swan Court Lamport NN6 9ER
The Abbey Primary School	Winchester Road Northampton NN4 8AZ
Ashby Fields Primary School	Wimborne Place Daventry NN11 0YP
Falconers Hill Infant School	Ashby Road Daventry NN11 0QF
Hall Meadow Primary School	Packer Road Kettering NN15 7RP
Kingsley Primary School	Wallace Road Northampton NN2 7EE
Kettering Park Infant School	Park Avenue Kettering NN16 9RU
Kettering Park Junior School	Wood Street Kettering NN16 9SE
Little Harrowden Primary School	School Lane Little Harrowden NN9 5BN
Standens Barn Primary School	Flaxwell Court Northampton NN3 9EH

St James Infant School	St James Street Daventry NN11 4AG
Wollaston Primary School	35 College Street Wollaston NN29 7SF
Trust Central Offices	Unit 2 Swan Court Lamport NN6 9ER
Rothwell Victoria Infant School	School Lane Rothwell NN14 6HZ
Rothwell Junior School	Gladstone Street Rothwell NN14 6ER

1.8 Contact Information

Name	Telephone	Email
Dawn Chapman	01604 434600	Dawn.chapman@inmat.org.uk

1.9 Project Schedule

	Timeline	Date
1	Invitation to quotes sent to agreed list of companies	Feb 9 th 2026
2	Return of written quotations	9.30 am March 30 th 2026
3	Further clarification on questions if needed from companies	W/c 30 th March
4	Companies x 3 will be requested to present to a trust panel	10 th April 2026
4	Presentation (10-15 Mins)	W/c 20 th April 2026
5	Award of Preferred Contractor	1 st May 2026
6	Start date	Sept 1 st 2026

1.10 In General

General Instructions

If you intend to Quote for the provision of Internal Audit services for InMAT Academy Trust, please read the following instructions carefully and prepare your quote accordingly.

The Trust will not be responsible for any costs or expenses you incur in preparing or delivering or in the evaluation of the quote, nor for any costs or expenses incurred with the formation of a contract should you be successful. You are deemed to have obtained at your own expense, all information necessary for the preparation of your quote. Submitted quote documents should not be longer than 10 pages.

Prior to the date for return of quote, the representative of the Trust may clarify, amend or add to the documentation. A copy of each such instruction will be issued by the representative of the Trust to every contractor and shall form part of the quote documentation.

No amendment shall be made to the quote documentation unless it is the subject of such an instruction. You should promptly acknowledge receipt of such instructions.

Only clarifications made in writing by the Trust will form part of the Invitation to quote documents. All questions submitted to the Trust in writing and answers, will be logged, summarised and issued to all quoters.

All information contained in the invitation to quotes shall be treated as confidential except insofar as is necessary to be disclosed for the purposes of obtaining quotations essential for the preparation of your tender.

1.11 Quote Returns

One full copy of your quote document for the Trust:

Dawn Chapman
Chief Financial Operations Officer
Dawn.chapman@inmat.org.uk

All emails should be marked **Internal Audit Quote Documents** and must not be marked in any other way so as to indicate the name of the sender.

1.12 Receipt of Quotes

Quotes should be received up to: **9.30am on 30th March 2026** Submissions received after this date may not be considered. The Trust will accept no responsibility for difficulties during the process of submission and/or late or lost submissions.

1.13 Reference Checks

The Trust is requesting at least two references, preferably to similar trusts to the CFO/COO/CFOO. Providing name, contact details with email address and length of time known.

These will be contacted prior to the presentation.

1.14 Evaluation of Quotes

The Trust may seek confirmation that suppliers meet the minimum levels of economic and financial standing or technical or professional ability at any time. Suppliers must be financially sound. An external credit reference agency may be used, and, in addition, the Trust may seek copies of accounts and annual reports. The Trust expects suppliers to have been trading long enough to have published at least three years accounts.

1.15 Evaluation Weighting

Weightings have been attributed to specific areas for evaluation purposes; these are as follows:

Criteria	Weighting	%	Procedure
Quote Document – Presentation of, Compliance and Content/ quality of the audit team/audit team knowledge	Maximum	40	Scored during evaluation
Client References	Maximum	15	Scored from client reference forms
Fee /Value for Money	Maximum	35	Scored against Client Benchmark
Value Added Services – such as provision of bulletins and networking opportunities	Maximum	10	Scored during evaluation
Points to be scored	Maximum	100	

1.16 Contract Tenure

The new contract with the successful company will commence on **1st September 2026** and subject to annual reviews and break clauses; end on **31st August 2029**

PART TWO TO BE RETURNED: -

2.1 FORM OF QUOTE

I/We, the undersigned, having examined the Conditions of Contract, Specification and all other Quote Documents, hereby offer to supply the goods/undertake the services required, in accordance with the quote documents for prices detailed in the Pricing Schedule.

I/We understand that the Trust is not bound to accept the lowest or any quote received.

This quote remains open for acceptance for 90 days from the date fixed for the submission of quote in the Invitation to quote.

I/We agree that the essence of selective quoting is that the Trust shall receive bona fide competitive quotes from all those quoting.

In recognition of this principle, I/we warrant that this is a bona fide quote, intended to be competitive, and that I/we have not fixed or adjusted the price quoted by, or under or in accordance with any agreement or arrangement with any other quoter. I/ We furthermore warrant that no approaches have been made to any other quoters for the purpose of obtaining or influencing their quote prices or any other details of their bid.

I/ We also warrant that I/we have not and will not before the award of any contract for the work:

- (i)(a) communicate to any person other than the Trust / School the amount or approximate amount of the quote or proposed quote, except where the disclosure, in confidence, of the approximate amount of the quote was necessary to obtain insurance premium quotations required for the preparation of the quote.
- (b) enter into any agreement or arrangement with any person that they shall refrain from quoting, or that they shall withdraw any quote once offered or vary the amount of any quote to be submitted.
- (ii) pay, give or offer to pay or give any sum of money or other valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other quote or proposed quote for the work,

I/ We understand that should we directly or indirectly canvass any member of the Trust concerning the award of the contract for the provision of the Services, or directly or indirectly obtain or attempt to obtain information from any such member or official concerning any other quote for Goods/Services, I/ we will be disqualified. I/ We further understand that if discovery occurs after the award of the contract, the Trust shall then be entitled to summarily terminate the contract.

Unless and until a formal agreement is prepared and executed, this quote, together with your written acceptance thereof, shall constitute a binding contract between us.

Signature

Name

Position

Organisation

Address

.....

.....

Tel Email

Date

2.2 QUESTIONNAIRE

1. Please outline Companies history?

2. Do you have any experience of auditing Academy Trust?

3. What is your capacity to take on new clients?

4. Will you be able to offer sufficient level of support, during both the internal audit and throughout the year?

5. What are the levels of expertise /qualifications of auditors?

2.3 LIST OF REQUIRED QUOTE INFORMATION

- A. Fee Structure
- B. Conflict of Interest and Financial Stability Assurance
- C. Quality Assurance
- D. References
- E. Sample Reports
- F. Audit Plan
- G. Additional Services
- H. Modern Slavery Agreement - Attach
- I. Reference request – Enclose information

A. FEE STRUCTURE

Please provide a detailed fee structure for the main audit tasks specified and ad hoc chargeable work for both the coming and future years. Included in this should be details of charges for the addition of one or more schools to the audit. Details of the levels of staff in the proposed core audit team should be provided outlining their location, experience in general and specific school audit experience. Details of the experience of the firm in auditing academy trusts should be included with the fee structure.

B – CONFLICT OF INTEREST AND FINANCIAL STABILITY ASSURANCE

Please provide confirmation that your company is free from actual or perceived conflicts of interest, and what policies and procedures are in place to assure this.

Please provide details of what level of professional indemnity insurance you have in place and copies of your last three years annual accounts.

C – QUALITY ASSURANCE

Please provide details of internal and external checks that are made on the quality of audit work carried out and how your company responds to any issues raised.

D – REFERENCE

Please provide at least two references, preferably for similar trusts to the CFOO. These will be contacted prior to the presentation.

E – AUDIT REPORTS

Please provide a sample audit report layout.

F – AUDIT PLAN

Please provide details of your audit procedures including materiality, method of communication and a sample timetable.

G – ADDITIONAL SERVICES

Please outline any additional non-chargeable services your company can offer such as bulletins, updates, workshops etc. Please also detail the level of non-chargeable access the school would have to a partner/manager.