



Higher Education Procurement Academy

Continuous Professional Development
Programme brochure
Academic Year 2013-14

Foreword

The Higher Education Procurement Academy (HEPA) is the sector's own low-cost source of professional training and resources for you and your institution.

HEPA is a new initiative set up jointly by BUFDG Procurement Professionals Group (PPG), Leadership Foundation for Higher Education (LFHE) and the regional HE purchasing consortia to advance procurement capability and professionalism in UK universities and related institutions.

In Universities UK's Diamond Report, published in 2011, a number of recommendations were made requiring managers in institutions to be given better training and resources to deliver cost efficiencies and other important benefits.

With the challenge of budget cuts and declining surpluses, senior management across higher education and related sectors can no longer regard procurement as an administrative, process-based exercise. With over 35% of university costs spent buying goods and services, we can only meet demanding efficiency targets, and enhance student experience and competitiveness, if we start seeing procurement as a strategic asset. When appropriately skilled and supported, good procurement can deliver real cash savings and help protect institutions from fraud and unmanaged commercial and operational risk.

That is why Procurement UK is committed to supporting the Academy and promoting its benefits across the sector. All courses have been designed with the sector's specific requirements in mind, and will give everyone involved in managing suppliers at all levels of experience an opportunity to build their knowledge and skills in this important activity.

I would encourage all managers, across all disciplines, to take advantage of this personal development opportunity and hope you find it both rewarding and useful in your work.

Prof Nick Petford

Vice-Chancellor, University of Northampton and Chair of Procurement UK



Introduction to HEPA training

The Higher Education Procurement Academy (HEPA) is delighted to launch its learning and development opportunities programme for 2013-14. The programme has been developed in consultation with representatives from across higher education.

This is the first ever national, higher education training programme offering procurement professionals, and those with responsibility for purchasing, quality and variety in their personal development.

The courses are aligned to the HEPA procurement competency framework, which identifies the skills and competency levels required by all staff involved in the procurement process, assisting individuals to take ownership of their personal development through skills assessment, identification of development needs and career planning.

The higher education purchasing consortia, working with the British Universities Finance Directors Group (BUFDG), will manage the delivery of training.

The course will be delivered in a variety of ways by our external training partners BiP Solutions and PMMS. The course programme for 2013-14 includes:

- Introduction to Procurement
- Managing the Tender Process
- Fundamentals of Contract Law
- Practical Negotiation
- Contract Management
- Developing a Category Procurement Strategy

Courses will be held in Leeds, Manchester and London. Consortia members from across the regions are welcome at all locations. Full information on course costs, course outlines and learning outcomes are available in this brochure, or at www.hepa.ac.uk

How to book

To ensure a quality learning experience there are limitations on the maximum number of attendees, therefore, places are available on a first come first served basis. Delegates can secure their place by booking with a purchasing card and paying in advance at www.hepa.ac.uk/calendar

Please note, if you do not wish to pay via Paypal during the booking process, please click on 'Pay with a debit or credit card' to access the card payment option.

In order to ensure training is as affordable as possible, each course is dependent upon a minimum number of eight delegates. Where the minimum number has not been achieved the Higher Education Procurement Academy reserves the right to cancel up to 10 working days prior to the training taking place. *Delegates are advised not to book non-refundable advanced travel until 10 working days before the training date.* Delegates can cancel up to 12 working days in advance of the training date. Otherwise the full cost of training will be applied.

"I have attended a number of CPD courses by PMMS, an Academy trainer, since December 2012, each of which I found to be tailored for procurement practitioners in the HE sector and taught by presenters with a deep knowledge of the subjects covered.

The use of case studies was especially helpful and required group discussion of the topics covered. This in turn has made it more likely that the knowledge gained on the courses will be retained for application once back at the office."

Anthony Midgley, Contracts Officer, University of Leicester

Introduction to Procurement

Purpose

This Introduction to Procurement course will seek to provide an overview of the environment within which the Higher and Further Education sectors operate and the importance and role of procurement within that environment. The event will then further explain this role through the interactions between procurement and their stakeholders.

The event will review the current procedures in public procurement and the procurement routes available, from low-value contracts to high-value OJEU procurement exercises. It will also establish the main principles of public sector procurement and will discuss how these will impact upon procurement exercises.

It is critical that those responsible for procurement have the correct skills and knowledge to complete the process efficiently and effectively while protecting their organisation from challenge.

Target audience

This course is suitable for Higher and Further Education staff who are new to the procurement function or the public sector, or staff who manage low risk/low value purchases as part of their role.

Is this course for me?

If the answer is 'Yes' to most of the following questions, the course is definitely for you.

- Do you work in procurement but have not received any formal training?
- Do you have budgetary control or responsibility for managing contracts and need to improve your understanding of the role of procurement?
- Would you like to understand the differences between the selection and award stages within public sector procurement?
- Would you like to understand the thresholds, procedures and timescales which should be applied to public sector procurement?
- Would you like to learn the differences between contracts and framework agreements?
- Would you like to understand how to approach procurements which are not caught by the public contract regulations?

Course dates and locations

London

3 December 2013

School of Oriental & African Studies (SOAS), Brunei Gallery, Room 202, Thornhaugh Street, Russell Square, London, WC1H 0XG

Trainer: BiP Solutions' Procurement Advice and Support Service

Cost: £160

Duration: One day, approx 9:30 – 16:30

Delivery style: Slide presentation with trainer-led discussion, supported by exercises and case studies

Max no: 20.

Course content

- Higher education sector overview
- Hierarchy of procurement legislation
 - EU Treaty
 - EU Directive
 - UK Regulations
- Non-EU procurement
 - EU principles
 - Advertising regime
 - Transparency
- EU procurement overview
 - Thresholds
 - Procedures
 - Timescales
- Procurement processes
 - Quotes
 - Tenders
- Market engagement
 - Supplier relationship
- Selection and award process
- Considering sustainability
- Framework agreements
 - Accessibility
 - Competition
- Negotiation techniques.

Learning outcomes

The course is designed to provide delegates with a clear understanding of the basics of procurement, explaining the more basic structures around low value and other non-OJEU procurement.

The training will also identify a number of key issues that should be considered when undertaking any procurement process, including sustainability, early market engagement and the weighting of the tender.

Managing the Tender Process

Purpose

This Managing the Tender Process course will provide delegates with a systematic approach to tendering and the awarding of contracts, and will discuss how the best results can be achieved through compliant and effective procurement procedures and processes.

The event will explain best practice by looking at the procurement life cycle and at how the tender process can be effectively managed using logical procurement milestones as a guide. Course topics will range from life cycle costing to dealing with supplier questions. In addition, the presenters will discuss what information should be provided to suppliers at all stages of the procurement life cycle to reduce the risk of challenge.

Target audience

This course is suitable for Higher and Further Education staff who have a working knowledge of public sector procurement and wish to explore the tender process in greater depth.

Is this course for me?

If the answer is 'Yes' to most of the following questions, the course is definitely for you.

- Would you like to gain further knowledge of and insight into running a compliant tender process?
- Do you want to understand the difference between price and cost (whole life cycle costing in public sector procurement)?
- Would you like to have a better understanding of how SLAs and KPIs might be utilised in contracts?
- Would you like to understand how to handle low value or incomplete tender submissions?
- Would you like to have an understanding of the implications of the Remedies Directive and how to protect yourself against challenge?

Course dates and locations

Leeds

19 November 2013

Leeds Innovation Centre, 103 Clarendon Road, Leeds, LS2 9DF

London

11 March 2014

School of Oriental & African Studies (SOAS), Brunei Gallery, Room 202, Thornhaugh Street, Russell Square, London WC1H 0XG

Trainer: BiP Solutions' Procurement Advice and Support Service

Cost: £160

Duration: One day, approx 9:30 – 16:30

Delivery style: Slide presentation with trainer-led discussion, supported by exercises and case studies

Max no: 20.

Course content

- The contract procurement lifecycle
 - Contract management principles
 - Life cycle costing
- Stakeholder engagement
- EU procurement
 - Procedures
 - Timescales
 - Thresholds
- Structuring the tender process
 - Critical success factors
 - Service level agreements
 - Key performance indicators
- Dealing with supplier questions
 - Methodologies
 - Timescales
- Evaluation process
 - Qualitative and commercial
 - Handling low value bids
 - Incomplete tenders
 - Clarification meetings
 - Presentations
- Evaluation matrix
 - Scoring methodology
- Moderation meeting
- Remedies Directive
 - Standstill
 - Transparency
 - Risk of challenge
- Award notice
- Debrief.

Learning outcomes

This course is designed to provide delegates with an understanding of the principles of tender management, whilst also considering issues related to contract and relationship management, evaluation and debrief, through a selection of case studies and individual and group exercises.

Delegates will also gain a basic understanding of contract management; EU principles, procedures and processes; tendering structures and evaluation processes; and the Remedies regime.

Fundamentals of Contract Law

Purpose

Delegates will learn about key aspects of contract law and related statutory provisions. Common problems and mitigation measures are discussed and delegates will be equipped with the knowledge and tools to manage legal risk effectively through contracts.

Target audience

This course is aimed at procurement professionals and their colleagues who are, or may be required to procure, manage and administer contracts effectively.

Is this course for me?

If the answer is 'Yes' to most of the following questions, the course is definitely for you.

- Are you involved or about to become involved in contract drafting or contract management?
- Do you wonder what your standard terms and conditions actually mean?
- Do you feel that unforeseen problems and issues arise on your contracts more often than you would like or expect?
- Do you feel that your suppliers know more than you about the law relating to your contracts?
- Do you believe that liability for problems is limited to that set out in the contract document?
- Are you unsure of the difference between mistake and misrepresentation and the remedies typically available for each?

Course dates and locations

Leeds

10 October 2013

Leeds Innovation Centre, 103 Clarendon Road, Leeds, LS2 9DF

Manchester

21 November 2013

University of Manchester Conference Centre, Staff House, Sackville Street Campus, Manchester, M1 3AL

London

4 February 2014

School of Oriental & African Studies (SOAS), Brunei Gallery, Room 202, Thornhaugh Street, Russell Square, London, WC1H 0XG

Trainer: PMMS Consulting Group

Cost: £160

Duration: One day, approx 9:30 – 16:30

Delivery style: Presentation, exercises and facilitated discussion

Max no: 18.

Course content

- Contract formation and essentials
 - Letters of intent
 - Offer and acceptance
 - Choosing contractual terms - documentation
 - Battle of the forms
 - Tenders and contract drafting
 - Role of service level agreements and key performance indicators
 - Mistake and misrepresentation
 - Consideration and economic duress
- Generic contractual terms (classification)
 - Express/implied terms
 - Implied terms – Sale of Goods Act 1979
 - Exclusion of sections 12 – 15 Sale of Goods Act 1979
 - Implied terms - contract for services – Supply of Goods & Services Act 1982
 - Buyers' and sellers' terms and conditions for goods and services
 - Conditions, warranties and indemnities
 - Effect of 'acceptance' of goods on remedies
 - Liquidated damages and penalties
 - Un-liquidated damages
 - Exclusion clauses
 - Force Majeure clauses
 - Consequential and direct loss
 - The internet and contract formation
 - Unfair contract terms
 - Termination – typical clauses
- Negligence in the context of commercial contracts
- What can go wrong?
 - Common scenarios, mitigations and controls
 - Dispute resolution mechanisms – mediation, adjudication, arbitration and litigation.

Learning outcomes

The course is designed to provide delegates with a clear understanding of key aspects of contract law and negligence and how to address these through procurement contract documentation and contract management.

Practical Negotiation

Purpose

Delegates will explore the nature of negotiation, the different types of negotiation and the process of negotiation in a public sector context. The five styles of negotiation will be considered and delegates' preferences will be assessed using a tried and tested profiling technique. Delegates will learn about the six key phases of the negotiation process, the use of tactics and the importance of behaviour. Delegates will be given a range of templates to aid preparation for future negotiations.

Target audience

The course is aimed at procurement professionals and their colleagues who have a basic knowledge of negotiation and wish to develop their understanding and skill.

Is this course for me?

If the answer is 'Yes' to most of the following questions, the course is definitely for you.

- Do you have limited experience of negotiation but are beginning to get more involved?
- Are you involved in negotiations but have not received any formal training?
- Would you like to learn about the appropriate use of tactics in a negotiation?
- Would you like to learn how to adapt your approach to the characteristics of the purchase?

Course dates and locations

London

14 January 2014

School of Oriental & African Studies (SOAS), Brunei Gallery, Room 202, Thornhaugh Street, Russell Square, London, WC1H 0XG

Trainer: PMMS Consulting Group

Cost: £160

Duration: One day, approx 9:30 – 16:30

Delivery style: A highly interactive workshop based on presentation and facilitated discussion, supported by actual scenarios to demonstrate application of the five styles, six phases and seven tactics of negotiation.

Max no: 16.

Course content

- Complete a diagnostic negotiation profile
 - Understand personal preference in relation to the five key approaches to persuasion – your preferred style of negotiation
 - Compare personal and ideal profiles
- Business and interpersonal relationships and impact on the type of negotiation
 - Evaluating the balance of power – the role of positioning and preferencing
 - Arm's length to partnership business relationships – developing an appropriate negotiation strategy
 - Interpersonal relationships – understanding assertion
- The negotiation process from preparation to conclusion
 - The six key phases and the importance of rigorous preparation and planning
 - Identification of variables and target setting
 - Tactics and their use
 - Prepare for, plan and complete a negotiation – case study and role play
- Personal action plan.

Learning outcomes

This course is designed to provide delegates with a clear understanding of how to plan and conduct a successful negotiation. Delegates will also gain an appreciation of the impact of personal traits and associated behaviour on negotiated outcomes.

Contract Management

Purpose

The Contract Management course is designed to help attendees gain a clearer understanding of the key drivers for successful contract management, including focusing on outcomes, using performance measures, incentives and penalties.

Robust contract management is critical to the successful delivery and performance of contracts. Used successfully, it enables both the contracting authority and end user to achieve value for money, while allowing for a structured process to develop and enhance the contract outcomes.

Contract management has too frequently been overlooked and under resourced, leading to a failure to appreciate the benefits that can be realised by implementing the correct processes and procedures.

Target audience

This event is suitable for Higher and Further Education staff who are engaged in procurement, contract preparation or contract and supplier management and wish to develop this skillset further.

Is this course for me?

If the answer is 'Yes' to most of the following questions, the course is definitely for you.

- Are you responsible for managing contracts but have not received any formal training?
- Do you want to fully understand material contract variation and the potential risk of challenge that it creates?
- Would you like to develop your understanding of change management within contracts?
- Do you want to know how to measure contract performance?

Course dates and locations

Leeds

23 January 2014

Leeds Innovation Centre, 103 Clarendon Road, Leeds, LS2 9DF

Manchester

8 April 2014

University of Manchester Conference Centre, Staff House, Sackville Street Campus, Manchester, M1 3AL

London

13 May 2014

School of Oriental & African Studies (SOAS), Brunei Gallery, Room 202, Thornhaugh Street, Russell Square, London WC1H 0XG.

Trainer: BiP Solutions' Procurement Advice and Support Service

Cost: £160

Duration: One day, approx 9:30 – 16:30

Delivery style: Slide presentation with trainer-led discussion, supported by case studies

Max no: 20.

Course content

- Contract management
 - Achieving value for money
 - Aggregation issues
- Managing service delivery
 - Contract administration
 - Managing change
- Critical success factors
- Customer provider interface
- Service level management
- Measuring quality
 - Determining metrics
 - Benchmarking
 - Measuring quality
- Risk
 - Risk assessment
 - Handling risk
 - Five Ts
 - Risk register
- Managing the relationship
 - Communication levels
 - Assessing the relationship
 - Handling problems
 - Escalation procedures
- Contract administration
 - Contract maintenance
- Seeking improvements
 - Incentives/benefit-based payments
 - Continuous improvement
 - Added value
- Change
 - Types of change
 - Drivers for change
 - Avoiding material contract variation.

Learning outcomes

The training will identify the key issues that should be considered when implementing contract management processes: identifying the key personnel and communication requirements; the need for manageable information collection; continuous management of the contract, suppliers and end users; and the reporting requirements necessary to allow for clear auditability.

Developing a Category Procurement Strategy

Purpose

Delegates will learn how to apply analytical procurement tools in a structured way, in order to identify the best procurement strategy for a category of expenditure. A case study (or live project if available) will be used to illustrate and practice applications of the tools.

Delegates will also learn how to link category objectives to individual business and wider organisation goals and how to offer constructive challenge in the light of knowledge gained through use of the tools.

Target audience

The course is aimed at procurement professionals and their colleagues who are, or may be required to identify the optimum procurement strategy for a category of expenditure.

Is this course for me?

If the answer is 'Yes' to most of the following questions, the course is definitely for you.

- Are you involved or about to become involved in developing category procurement strategies?
- Do you feel that, although aware of the range of analytical tools and techniques available, you could make better use of these tools in practice?
- Would you like to learn how to apply key analytical tools in a structured way to find the best procurement strategy?
- Would you like to be able to offer evidence-based constructive challenge to stakeholder perception of key needs/objectives?

Course content

- A structured approach - overview
- Setting the initial objectives for a category of spend
- Building the category team
- Understanding current supply arrangements
 - Mapping the current process
 - Strengths, weaknesses, opportunities and threats
- Market analysis
 - Market structure, suppliers and competition
 - Supply positioning – the buyer's view
 - Supply chain mapping, risks and cost drivers and levers
 - Supplier analysis – strategic and financial
 - Supplier preferencing – the supplier's view
- Verifying business needs/objectives
- Strategy development
 - Developing options
 - Selecting the preferred option
- Preferred procurement strategy
- Implementation plan
- Review and lessons learnt.

Course dates and locations

London

12 & 13 February 2014

School of Oriental & African Studies (SOAS), Brunei Gallery, Room 202, Thornhaugh Street, Russell Square, London, WC1H 0XG

Manchester

4 & 5 March 2014

University of Manchester Conference Centre, Staff House, Sackville Street Campus, Manchester, M1 3AL

Trainer: PMMS Consulting Group

Cost: £320 (not including overnight accommodation)

Duration: Two days, approx 9:30 – 16:30

Delivery style: Presentation, exercises and facilitated discussion

Max no: 18.

Learning outcomes

The course is designed to provide delegates with a clear understanding of the process of developing a category procurement strategy. Delegates will also gain experience of applying a selection of key analytical tools and drawing conclusions to help identify the best procurement options.

Additional HEPA training and resources

Courses coming soon...

HEPA intends to run the following courses in Year 2 (starting October 2014). Keep an eye on www.hepa.ac.uk for further details in 2014.

- Advanced Negotiation (2 days)
- Specification Writing
- Introduction to EU Procurement
- Advanced EU Procurement
- Sustainable Procurement
- Effective Use of Competitive Negotiation

Additional HEPA tools and resources

HEPA offers much more than face-to-face training; other resources available from the Academy include:

- A HEPA website for online networking, news and resources;
- Competency frameworks and template job descriptions to help you benchmark roles;
- Further developments to launch over 2013-14, including e-learning courses; and leadership, mentoring and coaching programmes.

Procurement Maturity Assessments (PMAs) are also available to all institutions, provided by SUPC, offering low-cost, detailed assessments of procurement capability to benchmark performance and drive improvement. Your PMA report will also help identify areas of the Academy that you may benefit from using.

To book a PMA contact the SUPC main office on tel: 0118 935 7081.

For more information on all these tools and resources, visit www.hepa.ac.uk

Contact us

HEPA is delivered by a number of partners:



For general enquiries, the HEPA team can be reached at:
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