

Procurement and Commercial
Training Framework

Lot 1: Procurement and

Lot 2: Sustainable Procurement including Climate Change

Buyer's Guide
2022-2024



THE FRAMEWORK AGREEMENT

This buyer's guide provides guidance to public sector organisations (see page 2) on accessing and using the **framework agreement** on procurement and commercial training with two separate Lots, each with a single supplier.

The framework (Case Ref: 489881) is listed on the Scottish Government's [Contracts Directory](#) and the Contract Award notice is [available on the Public Contracts Scotland website](#).

The learning offerings available through this framework are aligned to the [National Procurement Competency Framework](#) and its online tool the **Procurement Development Framework**.

As well as learning interventions available in a "closed" manner to public bodies, the suppliers will also host a series of "open" courses throughout each year available to attend on a per-place basis. This will provide improved access for smaller organisations across the Scottish public sector.

LOT 1: PROCUREMENT

SCOPE The scope of this Lot is public procurement skills across a broad range of topics covering goods, services and works, including legislation relevant to Scotland, building commercial acumen, and procurement specialisms such as ICT and Construction.

- The Scottish Procurement and Property Directorate awarded a single supplier to this lot for the provision of Procurement training.
- This lot commenced on **9 December 2021** for a period of three years with the option to extend for one more year. The lot currently runs to 8 December 2024.
- The contractor on this lot is **Scotland Excel Academy**.

In this document a **BLUE** strapline is used to highlight where procedures and rules apply only to **Lot 1: Procurement**.

LOT 2: SUSTAINABLE PROCUREMENT INCLUDING CLIMATE CHANGE

SCOPE The scope of this Lot is public procurement skills specifically related to the Sustainable Procurement Duty and its associated tools and guidance, with particular regard to improving procurement capability to meet our national climate change aspirations.

- The Scottish Procurement and Property Directorate awarded a single supplier to this lot for the provision of Sustainable Procurement training.
- This lot commenced on **6 December 2021** for a period of three years with the option to extend for one more year. The lot currently runs to 5 December 2024.
- The contractor on this lot is **Sustainable Procurement Ltd**.

In this document a **GREEN** strapline is used to highlight where procedures and rules apply only to **Lot 2: Sustainable Procurement including Climate Change**.

ACCESS

Both lots are available for use by:

by the Scottish Ministers (including Agencies), Scottish Non-Departmental Public Bodies, offices in the Scottish Administration which are not ministerial offices, cross-border public authorities within the meaning of section 88(5) of the Scotland Act 1998, the Scotland Office, the Scottish Parliamentary Corporate Body, councils constituted under section 2 of the Local Government etc. (Scotland) Act 1994, bodies registered as social landlords under the Housing (Scotland) Act 2001, Scottish health boards or special health boards, all NHS Scotland, Student Loans Company Limited, the Commissioner of Northern Lighthouse operating as the Northern Lighthouse Board, Scottish Futures Trust, Equality and Human Rights Commission, Zero Waste Scotland, Business Stream Ltd, the Business Gateway National Unit at the Convention of Scottish Local Authorities, further or higher education institutions being fundable bodies within the meaning of section 6 of the Further and Higher Education (Scotland) Act 2005, any public body established by or under the Scotland Act 1998 or any Act of the Scottish Parliament, any association of or formed by one or more of the foregoing, bodies financed wholly or mainly by one or more of the foregoing, bodies subject to management supervision by one or more of the foregoing and bodies more than half of the board of directors or members of which, or, in the case of a group of individuals, more than half of those individuals, being appointed by one or more of the foregoing. In addition to the contracting authorities listed, the framework agreement will be available to charities entered on the Scottish Charity Register and voluntary organisations entered on the Membership Database of the Scottish Council for Voluntary Organisations.

For the purposes of this guide, bodies accessing the frameworks will be referred to as **framework public bodies**.

Note: It is the responsibility of any framework public body organisation wishing to use a framework agreement to satisfy itself that it is eligible to do so. Entitlement guidance on this can be found in annex A of Scottish Government Guidance on Framework Agreements. If there is any doubt, legal advice should be sought.

SUMMARY

The two lots are available for:

- (i) the **delivery** of learning activities from the framework's learning programme (see page 5), which can be tailored and contextualised for the framework public body,
 - (ii) the **development** of new learning activities (see page 9) for inclusion in the learning programme, which can then be delivered to framework public bodies.
- and
- (iii) an **open programme** of learning activities available to framework public bodies on a per-place basis enabling improved access to a range of courses for smaller organisations.

CONTACTS

The Scottish Government

Framework Manager

Daisy Hall

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Enquiries Mailbox

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Lot 1: Scotland Excel Academy

Framework Agreement Manager for Lot 1

Laurie Anne Campbell

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Lot 2: Sustainable Procurement Ltd

Framework Agreement Manager for Lot 2

Philip Duddell

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KNOWLEDGE HUB

The [Professional Practice and Development Knowledge Hub](https://khub.net/group/professional-practice-and-development) is for members involved in public sector procurement in Scotland. This site can be used by users wishing to share learning spaces across the Scottish public sector and to discuss the frameworks.¹

AGREED FRAMEWORK RATES, TERMS AND CONDITIONS

Full details of framework terms and conditions and pricing are available on Knowledge Hub. For access to Knowledge Hub please contact Scottish Procurement (telephone: 0300 244 1282 or email: scottishprocurement@gov.scot).

Framework terms and pricing should be treated as 'commercially confidential' and must not be shared with anyone outside your organisation without the prior approval of Scottish Procurement.

¹ <https://khub.net/group/professional-practice-and-development>

ORDERING PROCEDURES

Discussing your requirement

Please discuss your requirement with the relevant provider before filling in Part A of the order form, as this can help clarify the matching of the offerings to your needs and suitable time-scales.

1. The Framework Public Body shall complete relevant part of the Order Form and send it by Notice, **sent by electronic mail to the relevant contractor.**
2. The contractor shall complete Part B of the Order Form, appending a brief response, and send it by Notice, sent by electronic mail to the Framework Public Body.
3. The Call-off Contract shall be formed by the Framework Public Body sending an order to the contractor confirming the agreement recorded on the Order Form. The order shall contain relevant payment details and a data protection schedule at the call-off level.

Contract Award

Buyers are reminded of the obligations contained in the [Procurement Reform \(Scotland\) Act 2014](#) and [The Public Contracts \(Scotland\) Regulations 2015](#) in relation to the award of contracts valued equal to or greater than £50,000.00 including those awarded as a result of a framework call-off.

In particular, buyers should note that in accordance with [Section 23\(2\)](#) of the act the award of contracts must be publicised on the Public Contracts Scotland website and in accordance with [Section 35](#) of the act contracts must be registered in the contracting authority's 'contracts register'.

VENUES

The contractor will deliver the course at a venue or through a digital platform arranged by the framework public body.

Where delivered in a face-to-face manner this should be at a public sector venue and must be fully accessible, have reasonable transport links and have suitable accommodation nearby for overnight stays.

TIMESCALES

Standard Course timing

The framework public body will allow the contractor sufficient lead time to arrange a training course. The contractor will be required to provide standard course delivery dates to the purchaser that are **within 4 weeks** of call-off contract award, unless the purchaser and contractor mutually agree to a later course delivery date.

Course materials will be provided to the purchasing organisation at least **2 working days** in advance of the course or at least 7 working days where pre-work is required.

Development timing

Once the request is received the contractor will advise on the number of days required to develop the activity, the contractor's proposed staff, and the timing of the delivery of the work.

The contractor will develop the activity with the framework public body in a **timely manner**.

Completion is subject to **mutual agreement**.

CANCELLATIONS

Cancellation of training activities will not incur a cost if notice of **at least 6 working days** is given (not including public or local holidays).

Cancellation due to **adverse weather conditions/acts of nature** will not incur a cost.

THE LEARNING PROGRAMME

The following learning activities are available for delivery. Correct as of **December 2022**.

Procurement (PR)

- 01 Category Management & Strategic Sourcing
- 02 contract and supplier management
- 03 Contract law terms and conditions
- 04 Frameworks and mini competitions
- 05 Introduction to public procurement
- 06 Managing the tender process
- 07 TUPE and procurement
- 08 Procurement of works
- 09 Service level agreements/KPIs
- 10 Specification writing and development
- 11 Use of evaluation criteria for supplier selection and contract award
- 12 Finance for procurers
- 13 Value for money through cost/price analysis
- 14 Practical negotiation
- 15 Introduction to negotiation
- 16 Experiential learning about procurement
- 17 Identifying and assessing risk
- 18 Introduction to NEC4 contracts
- 19 Alternative routes to market
- 23 Introduction to international trade

Sustainable Procurement (SP)

- 01 Embedding Sustainable Procurement
- 02 Principles of Life Cycle Costing
- 03 Social Issues in Procurement
- 04 Sustainable Procurement Mentoring
- 05 Delivering Sustainable Procurement in Contracts and Frameworks
- 06 Embedding Equality in Procurement

ORDER FORMS – DELIVERY

Part A – For Completion By The Framework Public Body

Lot 1: Procurement

Organisation	
Contract Manager and address for Notices	Name: Address: Tel: Email: The Contractor will contact this individual to obtain and clarify the organisation's requirements.
Invoice Contact and Address (if different)	Name: Address: Tel: Email:
Order Number	To be quoted on all correspondence relating to this Order Form and to be used for invoicing:
Order Date	

REQUIREMENTS		
Contract Start Date:		
Contract End Date:		
Delivery Method (please select)	Virtual <input type="checkbox"/> Face to Face <input type="checkbox"/>	
Please select which courses you would like to book at what level and provide the number of delegates you expect to attend		
Workshop options	Tick to select workshop	Add number of Delegates to attend
Alternative routes to market	<input type="checkbox"/>	
Contract and supplier management	<input type="checkbox"/>	
Contract law terms and conditions	<input type="checkbox"/>	
Contract management and strategic sourcing	<input type="checkbox"/>	
Experiential learning about procurement	<input type="checkbox"/>	
Finance for procurers	<input type="checkbox"/>	
Frameworks and mini competitions	<input type="checkbox"/>	
Identifying and assessing risk	<input type="checkbox"/>	
Introduction to international trade	<input type="checkbox"/>	
Introduction to NEC4 contracts	<input type="checkbox"/>	
Introduction to negotiation	<input type="checkbox"/>	
Introduction to public procurement	<input type="checkbox"/>	
Managing the tender process	<input type="checkbox"/>	
Practical negotiation	<input type="checkbox"/>	
Procurement of works	<input type="checkbox"/>	

Service level agreements/KPIs	<input type="checkbox"/>	
Specification writing and development	<input type="checkbox"/>	
TUPE and procurement	<input type="checkbox"/>	
Use of evaluation criteria for supplier selection and contract award	<input type="checkbox"/>	
Value for money through cost/price analysis	<input type="checkbox"/>	
Please provide invoicing details – a purchase order number is required for training to proceed:		
Additional Information:		

For and on behalf of the Framework Public Body:

Name and Title	
Organisation	
Signature	
Date	

ORDER FORMS – DELIVERY

Lot 2: Sustainable procurement including climate change

Organisation	
Contract Manager and address for Notices	Name: Address: Tel: Email: The Contractor will contact this individual to obtain and clarify the organisation's requirements.
Invoice Contact and Address (if different)	Name: Address: Tel: Email:
Order Number	To be quoted on all correspondence relating to this Order Form and to be used for invoicing:
Order Date	

REQUIREMENTS	
Contract Start Date:	
Contract End Date:	
Details of the Services required	
Insert a description of the required training/mentoring including delivery method:	
Additional Information:	

For and on behalf of the Framework Public Body:

Name and Title	
Organisation	
Signature	
Date	

ORDER FORMS – DEVELOPMENT

Part A – For Completion By The Framework Public Body

Client	
Contract Manager and address for Notices	Name: Address: Tel: Email: The Contractor will contact this individual to obtain and clarify the organisation's requirements.
Invoice Contact and Address (if different)	Name: Address: Tel: Email:
Order Number	To be quoted on all correspondence relating to this Order Form and to be used for invoicing:
Order Date	

REQUIREMENTS

Contract Start Date:	
Contract End Date:	

DETAILS OF THE SERVICES REQUIRED

<p>Details of the Training Services required:</p> <p>(append Brief)</p>
Date(s) and time(s) for supply of the Services:
Invoicing Arrangements:
Disclosure Scotland requirements (if basic, standard or enhanced Disclosure is required):
Other security requirements (for example, security standards):
Additional Information:

For and on behalf of the Framework Public Body:

Name and Title	
Date	

ORDER FORMS – PART B

Part B – For Completion By The Contractor

Contractor	
Contract Manager and address for Notices	

Contractor's Response
Contractor's response to the Brief:
Price:
Commencement Date:
Sub-contractors:
Relevant requirements for training (e.g. delegate list / email addresses, venue, etc.):

For and on behalf of the Contractor:

Name and Title	
Signature	
Date	

ORDER FORMS – DATA PROTECTION EXAMPLE

This is the Schedule referred to in the foregoing Conditions of Contract for the Purchase of Services between [Framework Body] and [Supplier Name]

SCHEDULE 5
PART 1
DATA PROTECTION EXAMPLE

Data Processing provision as required by Article 28(3) UK GDPR.

This Schedule Part 1 includes certain details of the Processing of Personal Data in connection with the Services: *Subject matter and duration of the Processing of Personal Data*

The subject matter and duration of the Processing of Personal Data are

[insert description here]

The nature and purpose of the Processing of Personal Data

[Include description here]

The type of Personal Data to be Processed

[Include list of data types here]

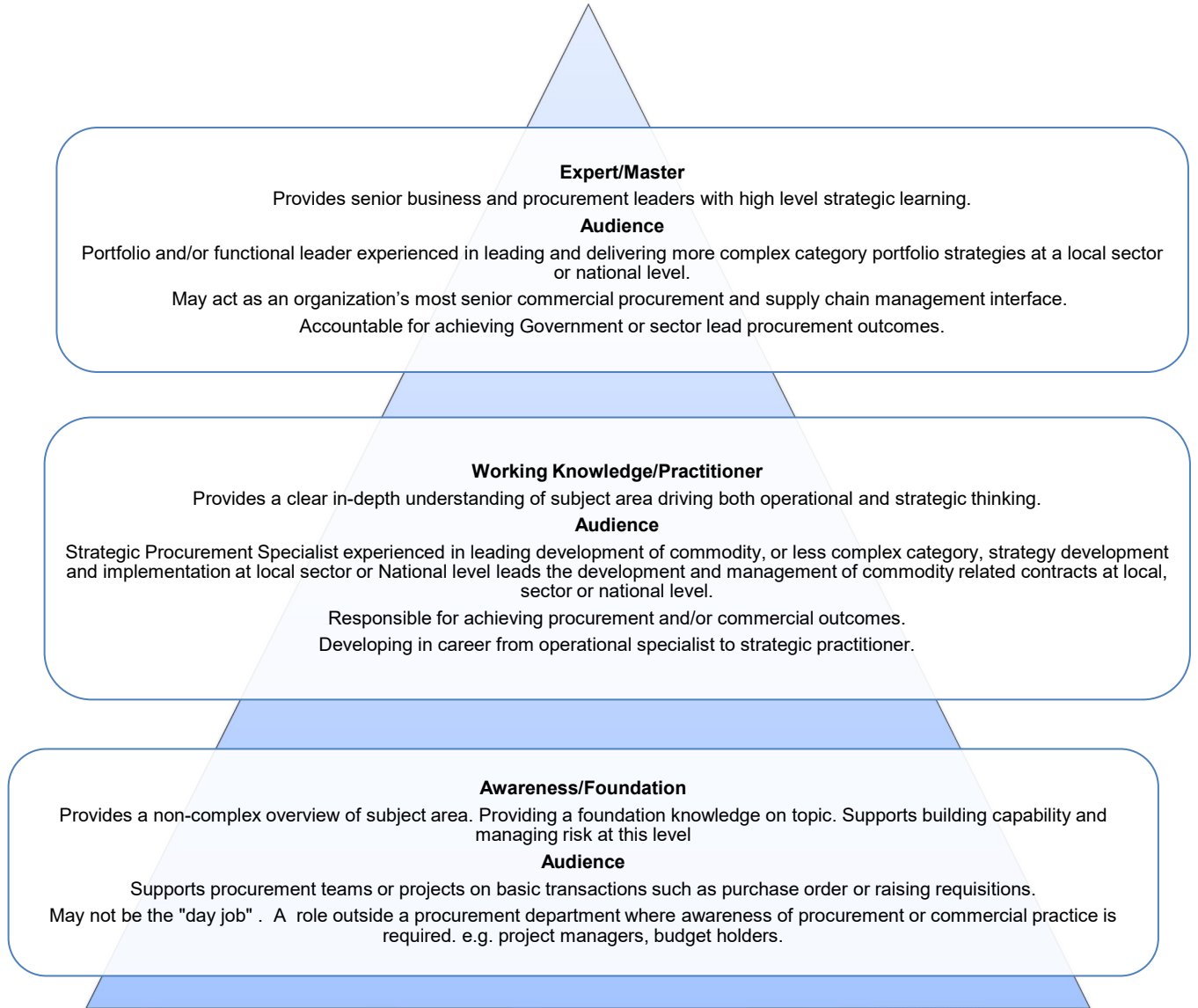
The categories of Data Subject to whom Personal Data relates

[Include categories of data subjects here]

The obligations and rights of the Purchaser

The obligations and rights of the Purchaser as the Data Controller are set out in Condition 28 of the Contract.

The levels of capability for activities are described below.



P01 - CATEGORY MANAGEMENT & STRATEGIC SOURCING

LEVEL

DURATION

METHOD

Working/ Practitioner

1 day

Online Training Course

OVERVIEW

Understanding the principles of category management and strategic sourcing in greater detail is useful for public procurement staff. On completion of this course attendees will have gained a greater knowledge of the subject and understand the use of supporting tools and techniques.

AUDIENCE & FORMAT

This course is ideal for public procurement staff working in operational and strategic roles. The content is presented by a trainer, supported by group discussions and case studies. Training notes are supplied for reference.

OUTCOMES

On completion of this course attendees will:

- Be able to apply analytical tools, identify risks and opportunities, and draw appropriate conclusions
- Be able to define appropriate governance and management arrangements and related resources
- Be able to implement procurement strategies to deliver planned objectives
- Know the benefits that a Category Management approach can deliver
- Understand how to review relevant data
- Understand the purpose of category management and the role of a strategic sourcing process within a system of category management.

COURSE CONTENT

- Category management – what is it and why use it?
- Category mapping
- Category scoping
- Opportunity assessment
- Stakeholder engagement
- Market analysis
- Pareto analysis and supply positioning
- Supplier preferencing
- Market management matrix
- Developing and implementing a category plan
- Category management organization and governance

Relevant Competencies

- Procurement strategy
- Commodity, supplier and supply chain profiling
- Spend analysis
- Market and supply chain analysis

PROCUREMENT JOURNEY

- Zone A (develop strategy)

P02 - CONTRACT AND SUPPLIER MANAGEMENT

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training course

OVERVIEW

Contract and supplier management is a key skill for public procurement staff. This course is for those wishing to understand and undertake contract and supplier management. On completion of this course attendees will have gained knowledge and understanding of the subject and be able to put principles into practice.

AUDIENCE & FORMAT

This course is for procurement professionals and contract users engaged in procurement, contract preparation or contract and supplier management. The content is presented by a trainer and supported by facilitated discussions centred on relevant and illustrative case studies, with training notes supplied.

OUTCOMES

On completion of this course attendees will:

- Be able to highlight key issues and make use of processes and techniques
- Be able to put the principles outline in the Procurement Journey into practice
- Be able to build supplier relationships and understand their needs
- Know the interdependence of contract strategy, procurement planning and the management of contracts
- Understand contract management and its relevance to your role
- Understand the controls required to manage contracts efficiently.

COURSE CONTENT

- Controls: getting what you contracted for, dispute resolution
- Performance: monitoring, measuring and improvement
- Relationships: developing and maintaining, building trust
- Supply chain and suppliers
- The contract management process
- The contract manager, their role and responsibilities
- The Procurement Journey, the procurement cycle, retendering
- The role and scope of contract management
- Types of contract, strategy, risks, variations and flexibility

Relevant Competencies

- Contract management
- Supplier management

PROCUREMENT JOURNEY

- Zone C (contract and supplier management)

P03 - CONTRACT LAW TERMS AND CONDITIONS

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training course

OVERVIEW

Understanding contract law and the terms and conditions of contracts is vital for public procurement staff, contract users and budget holders. On completion of this course attendees will gain knowledge of terms and conditions of contract.

AUDIENCE & FORMAT

This course is for those wishing to understand contract law and terms and conditions. On completion of this course attendees will have gained knowledge and understanding of the subject and be able to put principles into practice. The content is presented by a trainer and supported by illustrative case studies and sample terms and conditions. Training notes are supplied for reference.

COURSE CONTENT

- Clauses: contract management, incentives, performance, risk
- Commonly used clauses: 'buyer' and 'seller'
- Contract law essentials and key issues
- Drafting advice: what to do and what to avoid
- Examination of contracts for goods, works and services
- Legal issues to be aware of
- Specimen contractual terms (buyers and suppliers)
- Terms and conditions
- The form and structure of contracts

Relevant Competencies

- Contract law and Ts and Cs

OUTCOMES

On completion of this course attendees will:

- Be able to identify and use suitable terms in both buyer and seller contracts
- Know selected clauses that address practical problems and issues
- Know the structure and format of terms and conditions of contract
- Understand the basics of contract law relating to terms and conditions
- Understand the working terms and conditions of contract.

PROCUREMENT JOURNEY

- Zone A (develop documents)
- Zone C (contract implementation and management)

P04 - FRAMEWORKS AND MINI COMPETITIONS

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training course

OVERVIEW

Understanding frameworks is a vital skill for public procurement staff and contract users. On completion of this course attendees will gain knowledge of the processes of procurement using frameworks in compliance with EU procurement legislation.

AUDIENCE & FORMAT

This course is for staff working with frameworks and who wish to explore the procurement, management and use of frameworks in more depth. The content is presented by a trainer and supported by illustrative case studies. Training notes are supplied for reference.

COURSE CONTENT

- Award criteria for framework competition and 'call offs'
- Call offs: managing and running mini competitions, relevant recent case law
- Changes in legislation relating to Frameworks
- De-briefing and the 'Alcatel' standstill period
- Framework management: coordinating, reporting, performance, relationships
- Particular requirements of the framework procurement process
- Relevance to 'partially exempt' procurement
- Relevant aspects of EU procurement legislation
- Strategy and use of lotting
- Suppliers: Single or multi-supplier
- Users: Collaborative and single user

OUTCOMES

On completion of this course attendees will:

- Understand legislation as it applies to EU frameworks and mini competitions
- Be able to complete the processes of procuring from and using frameworks
- Understand the management of 'call offs' and mini competition exercises
- Be able to use effective strategies and lotting approaches to frameworks
- Know the recent changes in legislation related to frameworks.

Relevant Competencies

- Procurement strategy
- EU and regulated tender process

PROCUREMENT JOURNEY

- Zone A (develop strategy)
- Zone B (tender process)
- Zone C (contract management)

P05 - INTRODUCTION TO PUBLIC PROCUREMENT

LEVEL

DURATION

METHOD

Awareness/ Foundation

1 day

Training course

OVERVIEW

Understanding public procurement is vital for all staff working with public funds, contracts and related policy areas. On completion of this course attendees will have gained knowledge and understanding of public procurement. They will also be able to understand key terms, concepts and the Scottish procurement landscape.

AUDIENCE & FORMAT

This course is for staff who are new to the procurement function or to public sector procurement. It is also useful for those who operate within a devolved procurement environment, for example managing low-risk/low-value purchases as part of their overall duties. The content is presented by a trainer and supported by group work on a Route 1 procurement case study. Training notes are supplied for reference.

COURSE CONTENT

- Definition of procurement – role, responsibilities, challenges
- Differences between the public and private sectors
- Establishing good relationships and managing stakeholders
- Ethical issues relating to procurement
- Legislative requirements relating to procurement
- Sustainability in procurement
- The Procurement Journey, with a focus on Route 1 procurement
- The Scottish Model of Procurement
- The Scottish Procurement Landscape and the Reform programme

OUTCOMES

On completion of this course attendees will:

- Be able to explain the basics of Route 1 of the Procurement Journey
- Be aware of the general environment within which public sector procurement in Scotland operates and the Scottish Model of Procurement
- Know the basics of Goods, Services and Works
- Know the basics of procurement and the main differences between procurement in the public and private sectors
- Understand the importance of establishing good relationships
- Understand the procurement processes of the Procurement Journey.

Relevant Competencies

- Non-Specific

PROCUREMENT JOURNEY

- General application

P06 - MANAGING THE TENDER PROCESS

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training course

OVERVIEW

Understanding the tendering process is a vital skill for public procurement staff and other contract users involved in the period between issuing a tender and making a recommendation for contract award. On completion of this course attendees will have gained technical knowledge of, and practical skills for, the tendering process.

AUDIENCE & FORMAT

This course is ideal for procurement staff and other contract users involved in the tendering process. The content is presented by a trainer, supported by discussions and case-study analysis. Training notes are provided for reference.

OUTCOMES

On completion of this course attendees will:

- Be aware of the whole process for evaluating tenders
- Be able to deal appropriately with tender enquiries
- Be able to prepare a contract recommendation report
- Be aware of the legal responsibilities related to tendering
- Understand and able to explain the whole tendering process.
- Understand the importance of the invitation to tender (ITT) document
- Understand the key elements of contract recommendations.

COURSE CONTENT

- The Invitation to Tender (ITT) document: its purpose, key points, risks and issues
- Tender Evaluation: forming an evaluation panel, assessing tender commercial and quality criteria, scoring methods, post tender clarifications and negotiation
- Tender Return Period: clarifications, supplier meetings, receiving and opening tenders, security and confidentiality, electronic systems
- Contract award: recording the outcome, preparing a recommendation report, standstill periods, supplier debriefing
- Legal status
- Public accountability

Relevant Competencies

- Building tender documents
- EU & regulated tender process
- Tender evaluation

PROCUREMENT JOURNEY

- Zone B (tender process)

P07 - TUPE AND PROCUREMENT

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training course

OVERVIEW

Awareness of the 'Transfer of Undertakings (Protection of Employment) Regulations (TUPE) rules and how they apply to procurement activities is useful for public procurement staff and budget holders. On completion of this course attendees will gain knowledge of outsourcing and TUPE.

AUDIENCE & FORMAT

This course is for those needing to understand TUPE and be aware of the benefits and risks of outsourcing. The content is presented by a trainer and supported by relevant case studies, with training notes supplied for reference.

OUTCOMES

On completion of this course attendees will:

- Understand 'outsourcing'
- Know the characteristics of 'core' and 'non-core' services
- Understand the procurement related impacts of TUPE legislations
- Know how best to manage TUPE impacts in relation to outsourcing and transfer of service contracts as a result of re-tendering
- Be aware of the role of procurement in outsourcing projects
- Know the similarities between the public and private sector.

COURSE CONTENT

- Key elements of TUPE legislation
- Responsibilities and legal requirements
- Application of TUPE to procurement
- TUPE clauses
- Outsourcing: What is it? Why is it different?
- Key drivers of outsourcing
- Managing the key procurement issues around TUPE for outsourcing and transfer of established service contracts

LINKED COURSES

- Relevant to all procurement courses

PROCUREMENT JOURNEY

- Zone A (develop documents)
- Zone C (contract implementation)

RELEVANT TOOLS

- Not applicable

RELEVANT COMPETENCIES

- Legislation

P08 - PROCUREMENT OF WORKS

LEVEL	DURATION	METHOD	P08
Working /Practitioner	1 day	Training Course	

OVERVIEW

Understanding the process of procuring Works is useful for public procurement staff. On completion of this course attendees will have gained knowledge of procuring works and understand construction projects.

AUDIENCE & FORMAT

This course is for procurement staff who need to acquire, or develop, an understanding of works projects such as construction projects. The content is presented by a trainer and supported by relevant case studies and group exercises. Training notes are supplied for reference.

OUTCOMES

On completion of this course attendees will:

- Be aware of the different types of construction contract including model forms and their relationship to payment mechanisms and risk allocation
- Be aware of the range of related government and industry initiatives
- Know the scale of works projects in terms of expenditure and sustainability
- Understand how works projects are managed
- Understand the construction market and the wide range of services provided from planning, design and construction through to professional services
- Understand the importance of construction in the public sector

COURSE CONTENT

- The construction market: key players and capability, roles and subcontracting
- Government and industry construction initiatives
- Types of contract, specifications, risk allocation and payment mechanisms
- Works projects and contract management
- Common standard forms of contract (NEC, ICE, JCT) and contractual controls
- Construction risks
- Health and Safety issues
- The Scottish Government construction manual and government initiatives

Continued overleaf

- Understand the importance of controlling and managing variations and claims
- Understand the relationship between project and contract management and between the main contractors and any subcontractors.

Relevant Competencies

- Category Specific

PROCUREMENT JOURNEY

- All zones – category specific course

P09 - SERVICE LEVEL AGREEMENTS AND KPIS

LEVEL

DURATION

METHOD

Working /Practitioner

1 day

Training course

OVERVIEW

Understanding service level agreements (SLAs) and key performance indicators (KPIs) is vital for public procurement staff and other contract users. On completion of this course attendees will have gained a greater knowledge of SLAs and KPIs and be able to use them more effectively in contract and supplier management.

AUDIENCE & FORMAT

This course is for procurement professionals and contract users, such as Contract Managers, who wish to improve their understanding and use of service level agreements (SLAs) and key performance indicators (KPIs). The content is presented by a trainer, supported by group discussions and case studies. Training notes are supplied for reference.

OUTCOMES

On completion of this course attendees will:

- Be able to use SLAs and KPIs effectively
- Be able to monitor and improve supplier and contract performance
- Know the relationship between performance management and supplier development
- Knowledge of SLAs and KPIs
- Understand the use of SLAs and KPIs in different scenarios.

COURSE CONTENT

- Contractual and non-contractual SLAs
- Defining service levels and constructing KPIs
- Linking SLAs and KPIs to business need, specification and selection and award criteria
- Supplier development programmes
- Use of incentive mechanisms
- Using balanced score cards from the Procurement Journey
- What is a service level agreement and what is its purpose?

Relevant Competencies

- Specification development
- Building tender documents
- Performance management & measurement
- Continuous improvement

PROCUREMENT JOURNEY

- Zone A (develop documents)
- Zone C (contract & supplier management)

P10 - SPECIFICATION WRITING AND DEVELOPMENT

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training Course

OVERVIEW

Writing and developing specifications is a vital skill for public procurement staff and other contract users. On completion of this course attendees will have developed their skills and understanding of specification writing for tender documentation.

AUDIENCE & FORMAT

This course is ideal for procurement professionals and non–procurement contract users who are developing specifications to be incorporated into tender documents. The content is presented by a trainer, supported by relevant case studies. The course also features a practical workshop element of writing a specification to a supplied template. Training notes are provided for reference.

COURSE CONTENT

- Definition of a specification, understanding good and bad specifications
- Developing the specification
- Key elements of a specification:
- KPIs and specifications
- Outcome/output based specifications
- Practical exercise in drafting a specification
- Sustainability considerations
- The contract management implications of the specification
- The importance of accuracy and clarity
- The role of procurement: influencing the specification, terms and conditions
- Types of specification

OUTCOMES

On completion of this course attendees will:

- Be able to draft an effective specification for tender documentation
- Be aware of the impact of poorly drafted specifications
- Know how to avoid common pitfalls that lead to poorly executed contracts
- Know who is responsible for specification writing within tender documents
- Understand how to distinguish between types of specifications
- Understand the various types of specification.

Relevant Competencies

- Specification development
- Building tender documents

PROCUREMENT JOURNEY

- Zone A (develop documents)
- Zone C (contract & supplier management)

P11 - USE OF EVALUATION CRITERIA FOR SUPPLIER SELECTION AND CONTRACT AWARD

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training Course

OVERVIEW

The ability to define and use evaluation criteria legally and effectively is essential to achievement of value for money through the procurement process. The course examines the use of qualification criteria in the context of the Single Procurement Document, contract award criteria and evaluation models.

AUDIENCE & FORMAT

This course is ideal for procurement professionals and non–procurement contract users involved in supplier and tender evaluations who have a working knowledge of the tender process and wish to explore supplier selection and contract award criteria in depth.

COURSE CONTENT

- Procurement process and the purpose of contract terms, specification, exclusion, selection, short listing and contract award criteria
- Ensuring that procurement decision making criteria are both legally compliant and effective in delivering the procurement objectives
- Relevant aspects of EU procurement legislation:
 - Basic principles
 - Exclusion, selection and short listing criteria in the context of the Single Procurement Document
 - Contract award criteria
 - Sustainability opportunities
 - Cost effectiveness and life cycle cost
 - De-briefing and the standstill period
 - Remedies for breaches of the rules (Remedies Directive 2007)
 - Relevant recent case law
 - Design of selection and award criteria
 - Assessment processes and methods of scoring
 - Quality price models

OUTCOMES

On completion of this course attendees will:

- Able to distinguish between exclusion, selection, short listing and contract award criteria.
- Able to use the Single Procurement Document appropriately.
- Able to apply the range of criteria appropriately for all procurement procedures above and below European financial thresholds.
- Able to combine quality and price evaluations for a range of scoring systems.
- Aware of the consequences of non-compliance with legislative requirements

Relevant Competencies

- Building tender documents
- EU & regulated tender process
- Tender evaluation

PROCUREMENT JOURNEY

- Zone A (develop documents)
- Zone B (tender process)

P12 - FINANCE FOR PROCURERS

LEVEL

DURATION

METHOD

Working /Practitioner

1 day

Training Course

OVERVIEW

The course provides a basic knowledge of finance and investment appraisal from a procurement practitioner perspective.

AUDIENCE & FORMAT

This course is ideal for public procurement staff working in operational and strategic procurement roles.

OUTCOMES

On completion of this course attendees will:

COURSE CONTENT

- Financial statements, key ratios and their interpretation
 - Profitability
 - Return on capital employed
 - Liquidity
 - Combined ratios and assessment of the likelihood of insolvency
- Investment appraisal and the business case
 - Costs – sunk, future and whole life cost
 - Benefits – tangible and intangible
 - Dealing with uncertainty
 - Discounted costs and benefits
 - Benefit cost ratios, net present value, internal rate of return
 - Multi criteria analysis – taking account of intangibles
- Budgets
 - Revenue and capital
 - Directorates and cost centres
 - Historic and zero based budgeting
 - Fixed and flexible budgets
 - Budget monitoring

- Understand the key components of a balance sheet, profit and loss account and cash flow statement.
- Able to apply ratio analysis to assess an organisation's financial standing.
- Understand the principles of investment appraisal and life cycle costs.
- Understand how to set and monitor budgets.

Relevant Competencies

- Supplier Appraisal and Selection
- Strategic Sourcing
- Supplier Profiling

PROCUREMENT JOURNEY

- Zone A (develop strategy)
- Zone A (supplier selection)

P13 - VALUE FOR MONEY THROUGH COST PRICE ANALYSIS

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training Course

OVERVIEW

The course explores the relationship between cost and price. An understanding of methods of costing, pricing strategy, cost drivers and levers is essential in order to achieve value for money through review of supplier pricing.

AUDIENCE & FORMAT

This course is for procurement professionals and non–procurement contract users who may become involved in negotiation, price reviews or contract management.

OUTCOMES

On completion of this course attendees will:

- Understand financial accounts and use them to derive a model cost structure.
- Understand various costing techniques used by suppliers.
- Define “profit” and understand how profit margins are set.
- Understand how suppliers set prices for their products / services.
- Understand how and when to ask for cost breakdowns and why suppliers resist such requests.
- Understand how costs are “hidden” or “disguised”.
- Understand what is meant by “key cost drivers” and how procurement can help remove unnecessary cost from prices.
- Understand why suppliers request price increases and how to deal with them.

COURSE CONTENT

- Financial statements and Cost Model Structure
- Costing techniques – Absorption and Marginal Costing
- Pricing Strategies
- Cost Modelling
- Open Book Costing
- Cost Drivers and levers

Relevant Competencies

- Strategic sourcing
- Supplier profiling
- Market analysis
- Commercial competence and business acumen
-

PROCUREMENT JOURNEY

- Zone A (develop strategy)
- Zone B (open and evaluate tender)
- Zone C (contract and supplier management)

P14 - PRACTICAL NEGOTIATION

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training Course

Overview

A highly interactive course which provides an opportunity to build and/or enhance negotiation skills in a safe environment. Following an introduction to the process and practice of negotiation, delegates will have the opportunity to try new approaches and test their skills with experienced negotiation tutors.

AUDIENCE & FORMAT

This course is for those who are or may be involved in negotiation in the context of procurement or contract management.

Course Content

- Complete/update a negotiation profile
- Key Approaches and Persuasion methods
- Model for Moving People
- Important Phases in the Process
- Useful negotiating tactics
- Styles of negotiation
- Prepare for, plan and complete a negotiation
- Constructive feedback and review
- Write up the deal
- Present outcome
- Action plans

OUTCOMES

On completion of this course attendees will:

- Understand the negotiation process including preparation, planning, objective setting and the phases of negotiation.
- Understand what behavioural skills are required to secure a successful negotiation outcome.
- Understand when you are in a strong or weak negotiation position and what tactics to adopt for each circumstance.
- Develop negotiation skills through practice.

Relevant Competencies

- Negotiation
- Supplier management
- Communications

PROCUREMENT JOURNEY

- Zone B (post tender clarification or negotiation)

P15 - INTRODUCTION TO NEGOTIATION

LEVEL

DURATION

METHOD

Awareness/Foundation

1 day

Interactive Training Course

OVERVIEW

The course introduces the concept and process of negotiation. Delegates will explore different styles of negotiation and the impact of personal behaviours.

AUDIENCE & FORMAT

This course is for those seeking to gain or refresh knowledge of negotiation theory and practice.

OUTCOMES

On completion of this course attendees will:

COURSE CONTENT

- Complete a negotiation profile
- Key Approaches and Persuasion methods
- Types of negotiation
- Model for Moving People
- Important Phases in the Process
- Useful negotiating tactics
- Negotiation styles

- Understand the different types of negotiation and when to negotiate.
- Be aware of the different styles of negotiation
- Understand the key stages of the negotiation process
- Recognise some tactics

Relevant Competencies

- Negotiation
- Supplier management
- Communications

PROCUREMENT JOURNEY

- Zone B (post tender clarification or negotiation)

P16 - EXPERIENTIAL LEARNING ABOUT PROCUREMENT

LEVEL

Working /Practitioner

DURATION

Variable

METHOD

Coaching

OVERVIEW

Putting theory into practice can be challenging. The coaching service provides access to experienced procurement practitioners who can guide application of the procurement tools and techniques presented through the training programme. The service is tailored to the particular needs of the organisation and can comprise a mix of guidance, hands on support and facilitated reflective learning.

AUDIENCE & FORMAT

The service is most appropriate for those using a procurement tool, technique or procedure for the first time or for those engaged in particularly complex procurement.

OUTCOMES

- Participants will enhance their ability to apply procurement tools and techniques effectively.
- Participants will be supported in bringing a live procurement project to a successful conclusion.

COURSE CONTENT

- A bespoke coaching programme to develop competence in the application of procurement tools, techniques and procedures.
- Some examples of aspects of procurement competence where experiential learning could be beneficial are:
 - Category analysis
 - Risk assessment
 - Procurement option analysis and strategy development.
 - Planning and conduct of competitive dialogue and negotiation processes.
 - Formulation of selection and award criteria.
- Coaching is tailored to the needs of the client and is provided in relation to a live procurement project.

Relevant Competencies

Service is configured to address targeted competences

PROCUREMENT JOURNEY

- Zone A
- Zone B
- Zone C (contract & supplier management)

P17 - IDENTIFYING AND ASSESSING RISK

Level

Working/Practitioner

Duration

Half-day

Method

Training Course

This course will enable those in a procurement role to identify, manage and take action on risks within their procurement and the supply chain.

AUDIENCE & FORMAT

For those who need to understand and manage risk in a procurement setting.

Course Content

- Why and how we identify Risk
- Understanding and assessing risk and its impact at the following stages:
 - Pre procurement
 - Post procurement – pre contract
 - Contract and Exit
- Managing the risks in your procurement project:
 - Supplier Risks
 - Supply chain

OUTCOMES

On completion of this course attendees will:

- Understand Risk and why it needs to be identified.
- Understand how to
 - Categorise risk and map its implications
 - Identify risks throughout end to end the procurement process
 - Develop a mitigation strategy

Relevant Competencies

Procurement Journey

P18 - INTRODUCTION TO NEC4 CONTRACTS

Level

Duration

Method

Working/Practitioner/Expert

1 day

Training Course

OVERVIEW

This course will provide both experienced new procurers information and understanding about the NEC4 contraction standard contracts.

AUDIENCE & FORMAT

Those who are new to using the NEC4 contracts.

OUTCOMES

On completion of this course attendees will:

Course Content

- Overview of the purpose of NEC4
- Why we use NEC4 over other standards.
- Overview of the NEC4 landscape
- Spotlight on the key features of the NEC4 contract
- Discuss the benefits and risks of NEC4
- Overview of pricing options and how to apply them
- Key early warning signs
- Spotlight on Z clauses

- Understand purpose of NEC4
- Understand differences between NEC4 and SBCC
- Appreciate the extent of the NEC4 network
- Understand some key features of NEC4 contract
- Outline key benefits and Risks of NEC4
- Understanding of pricing options
- An awareness of early warning signs
- Understanding Z clauses

Relevant Competencies

Procurement Journey

P19 - ALTERNATIVE ROUTES TO MARKET

LEVEL

Working /Practitioner

DURATION

1 day

METHOD

Training Course

OVERVIEW

Understanding how to identify the most appropriate route to market for a specific requirement is a core procurement competence. On completion of this course attendees will be able to compare the likely effectiveness of alternative routes to market based on the objectives to be achieved and a sound knowledge of market capability and interest.

AUDIENCE & FORMAT

This course is ideal for public procurement staff working in operational and strategic roles. The content is presented by a trainer, supported by group discussions and case studies. Training notes are supplied for reference.

OUTCOMES

On completion of this course attendees will:

- Understand the need for clear objectives prior to commencing a formal procurement process.
- Be able to plan an appropriate level of pre-procurement market research and engagement.
- Know the key steps and attributes of the 6 EU procurement procedures, electronic auctions, frameworks and dynamic purchasing systems
- Be able to select the optimum route to market based on legal constraints and the best match between the objectives for the procurement and the characteristics of the alternative routes to market.
- Be able to use relevant appraisal tools.

COURSE CONTENT

- Market research and engagement
- Importance of clear and agreed objectives
- Key elements of each of the 6 procedures
- Key elements of the Dynamic Purchasing System
- How to set up a Dynamic Purchasing System
- Characteristics of other supporting mechanisms – electronic auctions, electronic catalogues and framework agreements
- How to choose between the procedures and supporting mechanisms

Relevant Competencies

PROCUREMENT JOURNEY

- Zone A (develop strategy)
- Zone B (tender process)

P23 - INTRODUCTION TO INTERNATIONAL TRADE

Level	Duration	Method
Working/Practitioner	1 day	Training Course

OVERVIEW

Understanding the Brexit related trade Changes can be complex . This training course will provide you with an insight to the roles of the Key players in decision making such as the WTO and highlight key issues and emerging areas relative for procurement professionals

AUDIENCE & FORMAT

This course is for anyone within the procurement profession who seeks to build their knowledge and understanding on the current landscape of International trade

Course Content

- How international trade is conducted
- Brexit Related changes: Single Market; Customs Union; Free trade Agreement.
- Alternatives to EU membership
- UK position on Brexit
- World Trade Organisation (WTO)
- GATT Agreement
- Agreement on Government Procurement CPA 2014
- Trading goods Internationally
- Trading services Internationally
- Value added Tax
- Future trade with the EU and related emerging issues.

OUTCOMES

On completion of this course attendees will:

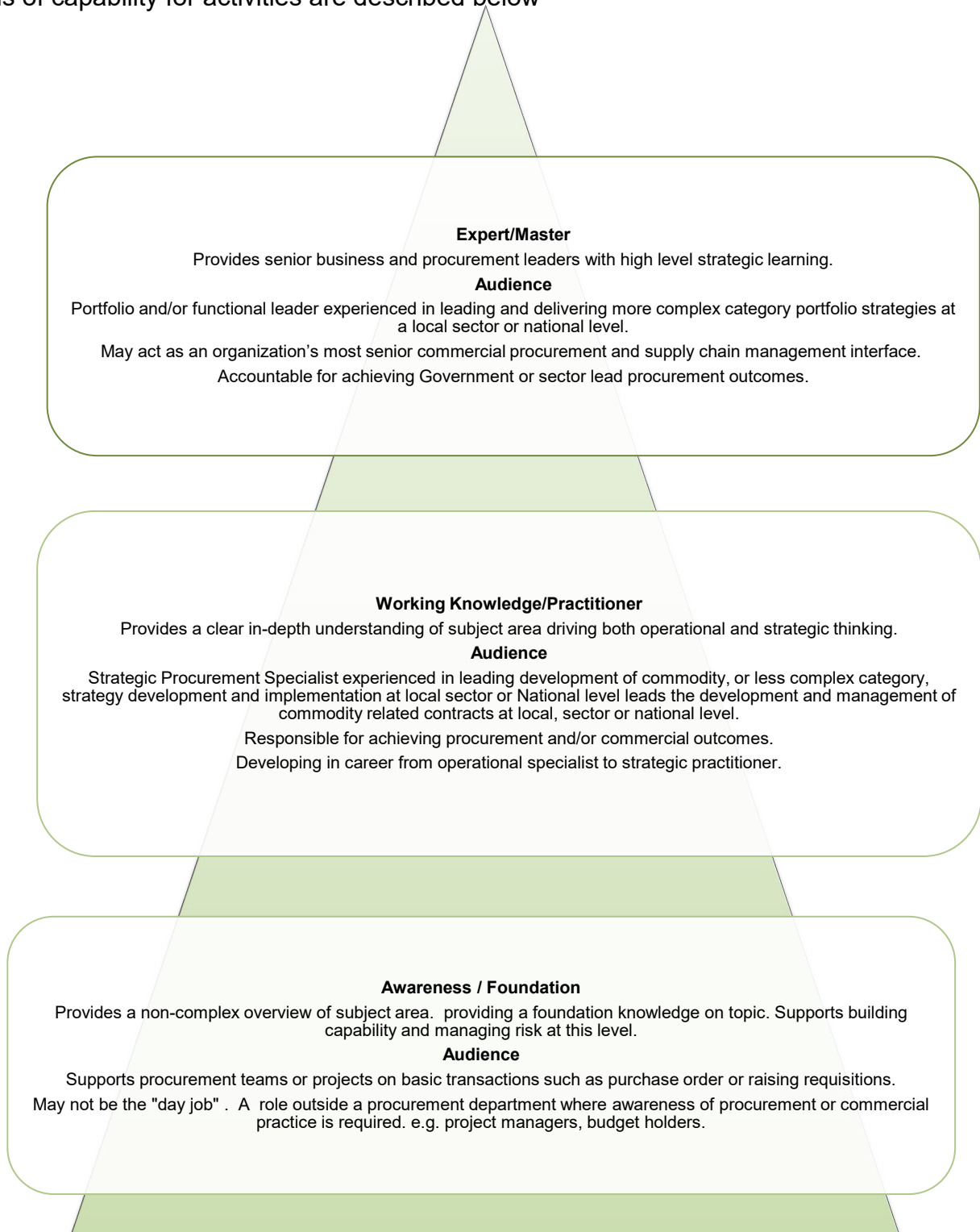
- Understand Brexit trade related changes
- Understand the role of World Trade Organisation (WTO) and implications for members
- Understand the purpose of the WTO Agreement on Government Procurement and implications for signatories
- Be aware of post Brexit changes to VAT and border checks in relation to trade with EU member states
- Be aware of the role of customs agents and freight forwarders
- Be aware of Incoterms and their role in standardising contracts for import and export of goods
- Be aware of UK government proposals to revise public procurement legislation
- Consider possible practical consequences for public procurement practitioners

Relevant Competencies

Procurement Journey

Sustainable Procurement

The levels of capability for activities are described below



EMBEDDING SUSTAINABLE PROCUREMENT

LEVEL

Working / Practitioner

DURATION

2 days

METHOD

Training course supported by a short e-learning module (Introduction to Sustainable Public Procurement)

OVERVIEW

The [sustainable procurement duty](#) requires public bodies to consider how public procurement can be used to improve the economic, social and environmental well-being of a contracting authority's area. Understanding how to do this, using appropriate enabling mechanisms, is vital for all public procurement professionals. On completion of this course attendees will understand how to use tools, techniques and good practice examples to embed sustainable procurement practices.

AUDIENCE & FORMAT

The course is applicable to procurement practitioners with responsibility for applying sustainable procurement requirements to procurements and liaising with relevant stakeholders. It is also suitable for those who influence budget and procurement decision making.

The course involves group discussion and interactive group exercises using relevant tools and case studies applied to 'live' procurements.

COURSE CONTENT

- Legal and policy context, including the sustainable procurement duty
- Early stage strategic thinking – stakeholder engagement, procurement planning, innovation in procurement and intended sustainable outcomes
- Life cycle impacts, life cycle costs, prioritising actions
- Rethinking the need
- Delivering the need – defining, setting specification, supplier selection, evaluation and award, supplier and contract management using 'live' procurements
- Policy, Strategy and Action Plans, embedding organisational sustainable procurement

OUTCOMES

On completion of this course attendees will:

- ☑ Be able to apply and explain sustainable procurement and its benefits to colleagues;
- ☑ Understand the importance of having policies in place, and what makes for good policies, strategies and action plans;
- ☑ Understand and use relevant Tools to support embedding of sustainable procurement including the use of Prioritisation and sustainability test in their organisation;
- ☑ Understand the importance of early consideration of intended outcomes and life cycle costs with relevant stakeholders and to be able to challenge stakeholders positively to re-think requirements;
- ☑ Be able to address risks and opportunities at relevant stages of the procurement process and how to encourage innovative, sustainable ideas.

LINKED COURSES

- Principles of Life Cycle Costing | SP02
- Social Issues in Procurement | SP03

OTHER LINKS

- [Procurement Journey](#)
- [Sustainability Test](#)
- [Prioritisation Tool](#)
- [Introduction to Sustainable Procurement Module](#)

SP01

PRINCIPLES OF LIFE CYCLE COSTING

LEVEL	DURATION	METHOD
Working / Practitioner	1 day	Training course

OVERVIEW

Public procurement cost effectiveness requires consideration of costs beyond initial purchase price. Regulation 68 of Public Contracts (Scotland) Regulations 2015 defines life cycle costs as those relating to acquisition, use, maintenance, end of life as well as potential externalities provided their monetary value can be determined and verified.

This requires an understanding of the scope and nature of relevant life cycle costs for the procurement of a commodity, project or service in strategic procurement planning as well as in subsequent stages of procurement.

On completion of this course attendees will understand the scope and nature of direct and indirect life cycle costs applying to products or services procured.

AUDIENCE & FORMAT

The course is applicable to procurement practitioners with responsibility for procuring commodities, projects and services that incur costs beyond initial purchase price. It is also suitable for finance professionals and other stakeholders responsible for setting budgets, considering procurement strategy and options.

The course involves group discussion and interactive group exercises using relevant tools and case studies applied to 'live' procurements.

OUTCOMES

On completion of this course attendees will:

- Understand the legal and policy context and requirements for Life Cycle Costing in procurement;
- Understand when to apply life cycle costs and relevant stakeholders;
- Be able to consider the relevant scope and apply Life Cycle Costs;
- Understand elements of costs associated with the purchase of a product or service over its life cycle;
- Apply learning to live categories/commodities/projects.

COURSE CONTENT

- Life Cycle Thinking
- Definitions: Whole Life Costs, Life Cycle Costs, Total Cost of Ownership
- Life Cycle Impacts v Life Cycle Costs
- Legal and Policy context
- Considering Life Cycle Costs – early stage strategic planning, options appraisal, evaluation
- Barriers to LCC and overcoming them
- Determining scope and data requirements – exercises using practical examples

LINKED COURSES

- Embedding Sustainable Procurement | SP01
- Social Issues in Procurement | SP03

OTHER LINKS

- [Procurement Journey](#)
- [Public Contracts \(Scotland\) Regulations 2015 Reg 68](#)

SOCIAL ISSUES IN PROCUREMENT

LEVEL

Working /
Practitioner

DURATION

1 day

METHOD

Training Course (it is recommended that the Introduction to Sustainable Public Procurement module is undertaken prior to the training).

OVERVIEW

The [sustainable procurement duty](#) requires public bodies to consider how public procurement can be used to improve the economic, social or environmental well-being of a purchasing authorities' geographical area (or 'area of responsibility').

The procurement landscape has changed for many social issues and attendees will be able to understand how to apply relevant and proportionate social issues into procurements, including consideration of innovative approaches.

AUDIENCE & FORMAT

The course is applicable to procurement practitioners and those with responsibility for applying social/ethical/socio-economic sustainable procurement requirements to procurements and liaising with relevant stakeholders. It is also suitable for those who influence budget and procurement decision making.

The course involves group discussion and interactive group exercises using relevant tools and case studies applied to 'live' procurements.

COURSE CONTENT

- Social issues defined
- Legal and Policy context – new landscape
- Early stage consideration
- Community benefits – lessons and evolution
- Supported Businesses
- Health and Wellbeing
- Communities
- Security and Crime
- Fairly and Ethically Traded
- Equality
- Fair Work
- Innovation in procurement
- Embedding relevant and proportionate social issues in procurement project – group exercises

OUTCOMES

On completion of this course attendees will:

- ☑ Understand the legal and policy context and requirements for Social Issues in procurement;
- ☑ Understand the range of social issues and how they relate to procurement;
- ☑ Understand how to determine and consider relevant social issues;
- ☑ Understand and share good practice examples;
- ☑ Consider evolution of Community Benefits into services and 'new' areas;
- ☑ Understand the role of innovative procurement models, early consideration and working with private/community partners on co-design and co-production of service models;
- ☑ Understand new regulations and how they have changed the landscape for social issues;
- ☑ Apply social issues in a relevant and proportionate manner to live categories/commodities/projects.

LINKED COURSES

- [Embedding Sustainable Procurement | SP01](#)
- [Principles of Life Cycle Costing | SP02](#)

OTHER LINKS

- [Procurement Journey](#)
- [Sustainability Test](#)
- [Prioritisation Tool](#)

SP03

SUSTAINABLE PROCUREMENT MENTORING

LEVEL	DURATION	METHOD
Working / Practitioner / Expert	Duration will be agreed between Sustainable Procurement and the customer	Mentoring: Participants are charged a day rate, with agreement on the extent and nature of support prior to commencement. Given the flexible nature of the support available, it is recommended that you initially discuss potential requirements with the framework provider.

OVERVIEW

This applied learning uses live (or where appropriate historic) procurement projects to enable public bodies to better understand how to apply relevant environmental and socio-economic risks and opportunities to these and related future procurements.

This can comprise:

- Hands on mentoring support to public bodies that focuses on a specific stage of commissioning and procurement (e.g. strategic procurement planning, development of specification and ITT) or throughout the procurement cycle.
- A workshop-based approach that uses live procurement projects as the basis of learning.
- Mentoring support to one organisation or including collaborative partners.

By the end of the mentoring users will understand how to use relevant tools and techniques to embed sustainable procurement practices in a live project(s) and how to apply this to future related projects.

This applied learning enables public bodies to better understand how to apply the Sustainable Procurement Duty and how public procurement can be used to improve the economic, social and environmental well-being of a contracting authority's area, based on real procurement projects.

This mentoring support is aimed at procurement projects where there are opportunities for sharing valuable learning within organisations as well as the wider public sector.

AUDIENCE & FORMAT

The mentoring is applicable to procurement practitioners with responsibility for applying sustainable procurement requirements to procurements as well as relevant internal and external stakeholders.

MENTORING CONTENT

- Strategic planning discussions
- Use of Sustainable Procurement Tools including Life Cycle Impact Mapping
- Review and input into procurement documentation and process, including where relevant: contract strategy, market engagement strategy, life cycle costs, specification, ITT, SPD, contract management, evaluation, monitoring and reporting of outcomes.

OUTCOMES

On completion of this mentoring participants will:

- Understand and use relevant Tools to support the embedding of sustainable procurement in specific procurements;
- Understand the importance of early consideration of intended outcomes and life cycle costs with relevant stakeholders and to be able to challenge stakeholders positively to re-think requirements;
- Effectively address in live procurement projects environmental and socio-economic risks and opportunities at relevant stages of the procurement process, how to encourage innovative, sustainable ideas and how to apply these in procurement documentation;
- Apply learning to current and future categories/commodities/projects (see the link provided below to some case studies for which mentoring has previously been provided).

LINKED COURSES

- Embedding Sustainable Procurement | SP01
- Principles of Life Cycle Costing | SP02
- Social Issues in Procurement | SP03

OTHER LINKS

- [Sustainable Procurement Mentoring Case Studies](#)

DELIVERING SUSTAINABLE PROCUREMENT IN CONTRACTS AND FRAMEWORKS

LEVEL	DURATION	METHOD
Working / Practitioner	1 day	Training Course (it is recommended that the Introduction to Sustainable Public Procurement and the Climate Literacy modules are undertaken prior to the training).

OVERVIEW

The [sustainable procurement duty](#) requires public bodies to consider how public procurement can be used to improve the economic, social and environmental well-being of a contracting authority's area. Understanding how to do this within Contracts & Frameworks, using appropriate enabling mechanisms, is vital for public procurement professionals. On completion of this course attendees will understand how to use tools, techniques and good practice examples to embed sustainable procurement practices within Contracts & Frameworks.

This applied learning uses live (or where appropriate historic) procurement projects to enable public bodies to better understand how to apply relevant environmental and socio-economic risks and opportunities to these and related future procurements.

AUDIENCE & FORMAT

The training is applicable to procurement practitioners with responsibility for applying sustainable procurement requirements to procurements as well as internal customers, end users and other relevant internal stakeholders. It is also suitable for those who influence budget and procurement decision making and management of eventual contracts and suppliers and reporting of procurement outcomes.

OUTCOMES

On completion of this course attendees will:

- Understand and use relevant Tools to support the embedding of sustainable procurement in specific procurements;
- Understand the importance of early consideration of intended outcomes and life cycle costs with relevant stakeholders and to be able to challenge stakeholders positively to re-think requirements;
- Effectively address in live procurement projects environmental and socio-economic risks and opportunities at relevant stages of the procurement process, how to encourage innovative, sustainable ideas and how to apply these in procurement documentation;
- Apply learning to current and future categories/commodities/projects.

COURSE CONTENT

- Legal & Policy context
- Early stage considerations
- Strategic planning discussions – defining the need
- Live projects:
 - Life Cycle Impact Mapping, life cycle costs
 - SPD
 - Use of Sustainable Procurement Tools
 - Delivering the need - specification, ITT, evaluation and award, contract management
- Collating, monitoring and reporting of outcomes.

LINKED COURSES

- [Embedding Sustainable Procurement | SP01](#)
- [Principles of Life Cycle Costing | SP02](#)
- [Social Issues in Procurement | SP03](#)

OTHER LINKS

- [Procurement Journey](#)
- [Introduction to Sustainable Procurement Module](#)

EMBEDDING EQUALITY IN PROCUREMENT

LEVEL

Working /
Practitioner

DURATION

1 day

METHOD

Training Course (it is recommended that the Introduction to Sustainable Public Procurement module is undertaken prior to the training).

OVERVIEW

The [sustainable procurement duty](#) requires that before a contracting authority buys anything, it must think about how it can improve the social, environmental and economic wellbeing of the area in which it operates, *with a particular focus on reducing inequality*.

In addition, public bodies have a general duty under the Equality Act to:

- Eliminate unlawful discrimination, harassment and victimisation
- Advance equality of opportunity between different groups
- Foster good relations between different groups

Scottish contracting authorities also:

- Have a specific duty to have due regard to whether the award criteria and performance conditions should include considerations to enable it to better perform the equality duty.
- Under the Fairer Scotland duty (part 1 of Equality Act) reduce inequalities of outcome caused by socio-economic disadvantage, when making strategic decisions.

The course enables delegates to better understand how to apply these duties to future procurements.

AUDIENCE & FORMAT

The training is applicable to procurement practitioners with responsibility for applying equality and sustainable procurement requirements to procurements as well as internal customers, end users and other relevant internal stakeholders. It is also suitable for those who influence budget and procurement decision making and management of eventual contracts and suppliers and reporting of procurement outcomes.

COURSE CONTENT

- Legal & Policy context
- Early stage considerations
- Applying equality in procurement to Live/example projects:
 - Delivering the need - specification, ITT, evaluation and award, contract management
 - Collating, monitoring and reporting of outcomes.

LINKED COURSES

- Embedding Sustainable Procurement | SP01
- Social Issues in Procurement | SP03
- Sustainable Procurement Mentoring | SP04

OUTCOMES

On completion of this course attendees will:

- Understand the legal context and requirements relating to Equality in procurement.
- Understand why it is important to consider the Scottish policy context relating to Equality in procurement.
- Understand relevant terminology.
- Know when and how to apply Equality considerations in procurement (using tools available).
- Emphasis on delegates considering relevant scope of Equality as early as possible in the procurement decision-making process.
- Understand how to monitor and report Equality outcomes.
- Learn from case studies and worked examples.
- Apply learning to live categories/commodities/projects.

OTHER LINKS

- [Procurement Journey](#)
- [Introduction to Sustainable Procurement Module](#)
- [Equality: sustainable procurement guidance](#)
- [Fairer Scotland duty \(part 1 of Equality Act\)](#)

Buyer's Guide

VERSION HISTORY

1.0	Initial Document	30 December 2021
2.0	Updated Document	16 January 2023

