



**ENHANCING
PROCUREMENT CAPABILITIES**

PROGRAMME FEBRUARY–NOVEMBER 2016

Enhancing Procurement Capabilities

February to November 2016

Scotland Excel's training delivery for 2016 offers a range of courses for public procurement staff at all stages of their career, whether starting out or continuing their professional development. Our courses cover a wide variety of topics in procurement, legal, finance, care procurement and NEC contracts.

With the new EU Procurement rules allowing enhanced levels of negotiation with suppliers (Competitive Procedure with Negotiation, Competitive Dialogue and Innovation Partnerships), we have continued our Introduction to Negotiation course. We have also retained our range of 'On-Demand' training courses. These advanced courses are designed for more experienced procurement professionals. Our on-line Technical Procurement Assessment service is again available in 2016. Delivered by our training partner BlueArc, and piloted by Scotland Excel, the service provides an electronic assessment of 'technical' procurement competencies, compares the output with other public and private sector organisations, and identifies skills gaps for staff development. More details can be found on page 30.

We have been liaising with the Scottish Government to deliver eLearning packages and awareness sessions on the new EU Procurement Directives and the Procurement Reform (Scotland) Act. Details of this training will be announced in due course. We hope our range of learning and development opportunities, supplemented by our master-class programme, will continue to provide support for the Scottish Public sector in delivering enhanced procurement capability.

How to Book

To book courses please click [here](#) to access our booking form.

You can also contact us by email: training@scotland-excel.org.uk

or contact Helene Holden on 0141 618 7436.

Nominated delegates should not attend any courses unless they have received official joining instructions from Scotland Excel.

Courses will be delivered according to Scotland Excel's terms and conditions for delivery of training services. Please email contactus@scotland-excel.org.uk for a copy of our T's & C's. All booking requests will be deemed to have accepted Scotland Excel's terms and conditions of delivery.



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EU Frameworks and Mini Competitions

Course Type

Practical application

Target Audience

Staff with a working knowledge of EU procurement legislation who wish to explore the procurement, management and use of frameworks in more depth.

Course Duration

1 day

Date and Location

13 October 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of the processes of procurement using frameworks in compliance with EU procurement legislation.

The course will provide an understanding of:

- Legislation as it applies to EU frameworks and mini competitions
- The process of procuring from and using frameworks
- The management of ‘call offs’ and mini competition exercises

Linked Courses

> EU Supplier Selection and Award Criteria

> Supplier De-briefing

Course Content

- Relevant aspects of EU procurement legislation:
 - Basic principles
 - Central procurement bodies
 - Particular requirement of the framework procurement process
 - Collaborative or single user
 - Single or multi-supplier
 - Strategy and use of ‘lots’
 - Use of award criteria for framework competition and ‘call offs’
 - Managing ‘call offs’ and running mini competitions
 - Relevant recent case law
 - De-briefing and the ‘Alcatel’ standstill period
- Relevance to ‘partially exempt’ procurement e.g. class B services
- Role of the framework manager:
 - Co-ordinating and reporting
 - Managing performance and relationships
- Impact of the 2007 Remedies Directive

Delivery Style

Presentation of content and trainer-led discussion supported by interactive case study and group exercises.

Procurement Journey

Zone A (Develop Strategy—Procurement Route)

Zone C (Contract and Supplier Management)

EU Supplier Selection and Award Criteria

Course Type

Technical understanding

Target Audience

Staff with a working knowledge of EU procurement legislation who wish to explore supplier selection and contract award criteria in more depth.

Course Duration

1 day

Date and Location

11 October 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of EU supplier selection and award criteria.

The course will provide an understanding of:

- How to construct effective supplier selection
- Award processes which are compliant with EU procurement legislation

Linked Courses

> EU Frameworks and Mini Competitions

> Managing the Tendering Process

> Supplier De-briefing

Course Content

- The tender process and the purpose of contract terms, specification, selection and award criteria
- Ensuring that selection and contract award processes are both EU compliant and effective in delivering the business need
- The linking of selection and award criteria to business need
- Relevant aspects of EU procurement legislation:
 - Basic principles
 - EU compliant selection criteria
 - EU compliant award criteria
 - Sustainability opportunities
 - Whole-life costs
 - De-briefing and ‘Alcatel’ standstill period
 - Remedies for breaches of the rules (Remedies Directive 2007)
 - Relevant recent case law
- Design of selection and award criteria
- Assessment processes and scoring matrices

Delivery Style

Presentation of content and trainer-led discussion supported by case study analysis.

Procurement Journey

Zone A (Develop Documents—PQQ and Selection and Award Criteria)

Supplier De-briefing

Course Type

Practical application

Target Audience

Procurement/technical staff involved in de-briefing suppliers following pre-qualification and contract award.

Course Duration

1 day

Date and Location

17 May 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of supplier de-briefing.

The course will provide an understanding of:

- Supplier de-briefing in the context of unsuccessful tender submissions
- How to use de-briefing to improve market capability and future bids
- The requirements of EU procurement legislation, re supplier de-briefing
- The implications of the Freedom of Information Act

Linked Courses

> EU Frameworks and Mini-Competitions

> EU Supplier Selection and Award Criteria

Course Content

- Purpose of de-briefing
- Planning the de-briefing process and communicating internally and with suppliers
- Understanding the suppliers perspective in order to provide useful feedback
- Formulating relevant and effective evaluation criteria compliant with EU procurement legislation and use of evaluation results for de-briefing
- EU procurement legislation regarding de-briefing suppliers:
 - General provisions regarding de-briefing
 - Specific requirements of the ‘Alcatel’ provisions
- Freedom of Information Act:
 - Requirements regarding disclosure
 - Confidentiality and exemptions
 - Guidance and recent case law
- Conducting a face to face de-briefing
- Learning from and managing supplier feedback and challenge
- Mobilising the successful tenderer
- Summary of do’s and don’ts

Delivery Style

Presentation of content and trainer-led discussion supported by case study analysis.

This course involves role play and delegates are required to participate in role play scenarios.

Procurement Journey

Zone C (Contract Award—De-briefing)

Cost/Price Analysis

Course Type

Practical application

Target Audience

Procurement professionals who need to understand the relationship between a supplier's cost, its profit, marketing objectives and price.

Course Duration

1 day

Date and Location

7 June 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of cost/price analysis.

The course will provide an understanding of:

- Financial accounts and how to use them to derive a model cost structure
- Costing techniques used by suppliers
- Define ‘profit’ and understand how profit margins are set
- How suppliers set prices for their products/services
- How/when to ask for cost breakdown and why suppliers resist such requests
- How costs are ‘hidden’ or ‘disguised’
- What ‘key cost drivers’ are and how procurement can help remove unnecessary costs
- Why suppliers request price increases and how to manage this

Course Content

- Financial statements and cost model structure
- Costing techniques: absorption and marginal costing
- Pricing methods
- Cost modelling
- Open book costing
- Cost drivers and levers

Delivery Style

Presentation of content and trainer-led discussion supported by interactive case study and group exercises.

Linked Courses

> [Managing the Tendering Process](#)

Procurement Journey

Zone B (Tender—Price Evaluation)

Total Cost of Ownership (TCO)

Course Type

Awareness

Target Audience

Procurement professionals acquiring commodities that incur significant costs beyond the initial purchase price of the product or service acquired.

Course Duration

1 day

Date and Location

12 May 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of whole life costing and the total cost of ownership (TCO).

The course will provide an awareness of:

- Elements of cost associated with the purchase of a product or service over its whole life cycle
- TCO management techniques

Linked Courses

> [Cost/Price Analysis](#)

Course Content

- Introduction to TCO, costing systems and business environment
- Summary of TCO Stages
- Application of DCF Technique to TCO.
- Managing the TCO:
 - Cost Reduction
 - Cost Drivers and Levers
 - Value analysis
 - Effect on Procurement Strategy
 - Risk Considerations

Delivery Style

Presentation of content and trainer-led discussion supported by case studies and group exercises.

Procurement Journey

General Application

Exploring Terms and Conditions of Contract

Course Type

Awareness

Target Audience

All levels of procurement professional would benefit from participating in this course.

Indeed, programme managers, project managers and budget holders would also benefit. Likewise for those involved in the initial formation of Invitation To Tender (ITT) documents and contracts and/or their subsequent management.

Course Duration

1 day

Date and Location

13 April 2016—Glasgow

25 October 2016—Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of terms and conditions of contract.

The course will provide an understanding of:

- Working terms and conditions of contract
- Suitable terms in both buyer and seller contracts
- The structure and format of terms and conditions of contract
- Selected clauses to address practical problems and issues

Linked Courses

> [Fundamentals of Contract Law](#)

> [Managing the Tendering Process](#)

Course Content

- Brief summary of some essentials of contract formation, including key concerns relating to the battle of the forms, letters of intent etc...:
 - The form and structure of contracts
 - Differing functions of terms and conditions
 - Performance definition clauses
 - Contract management clauses
 - Performance incentive clauses
 - Risk allocation clauses
 - Excusal of performance clauses
 - Commonly used “buyer” clauses
 - Commonly used “seller” clauses
- Specimen contractual terms (suppliers and buyers for discussion)
- Some do’s and don’ts of contract drafting
- Examination of contracts for sale of goods and for services

Delivery Style

Presentation of content and trainer-led group discussions supported by analysis of relevant case law.

Procurement Journey

Zone A (Develop Documents—Invitation to Tender)

Fundamentals of Contract Law

Course Type

Awareness

Target Audience

Staff involved in the preparation or management of contracts or who need refresher training in basic contract law and the formation of contracts at contract award.

Course Duration

1 day

Date and Location

12 April 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of the fundamentals of contract law.

The course will provide an understanding of:

- The key aspects of the law of contract and related statutory provisions
- Effective management of legal risk across the Scottish public sector
- The key differences between Scots law and legislation affecting the public sector in England and Wales

Linked Courses

> [Exploring Terms and Conditions](#)

> [Managing the Tendering Process](#)

Course Content

- Contract formation and essentials:
 - Letters of intent
 - Offer and acceptance
 - Choosing contractual terms – documentation
 - Battle of the forms
 - Tenders
 - Consideration and economic duress
 - Differences between Scots and English law
- Generic contractual terms (classification):
 - Express/implied terms
 - Implied terms—sale of goods
 - Exclusion of Sections 12–15
 - Implied terms—contract for services
 - Conditions and warranties
 - Effect of ‘acceptance’ of goods on remedies
 - Liquidated damages and penalties
 - Un-liquidated damages
 - Exclusion clauses
 - Force Majeure clauses
- The internet and contract formation

Delivery Style

Presentation of content and trainer-led group discussions supported by analysis of relevant case law.

Procurement Journey

Zone C (Contract Award—Award)

Guide to Outsourcing and TUPE

Course Type

Technical understanding

Target Audience

Staff who need an understanding of outsourcing and an overview of 'Transfer of Undertakings (Protection of Employment) Regulations 1981' (TUPE) rules as they apply to procurement activities.

Course Duration

1 day

Date and Location

26 April 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of outsourcing and TUPE.

The course will provide an understanding of:

- What is meant by outsourcing
- The characteristics of core and non-core services
- The similarities between the public and private sector
- The key drivers for outsourcing
- The benefits and risks of outsourcing
- The factors which need to be taken into account in the outsourcing decision
- The role of procurement in outsourcing projects
- The relationship between outsourcing and TUPE

Course Content

- Outsourcing: what is it and why is it different?
- Key drivers of outsourcing
- Building the business case for outsourcing
- Key outsourcing issues to manage
- TUPE clauses

Delivery Style

Presentation of content and trainer-led discussion supported by case study analysis.

Linked Courses

- > Contract Management
- > Improving Supplier Relationships
- > Service Level Agreements & KPIs

Procurement Journey

Zone C (Contract Implementation)

Contract Management

Course Type

Technical understanding

Target Audience

Staff engaged in procurement, contract preparation or contract and supplier management.

Course Duration

1 day

Date and Location

16 February 2016—Glasgow

20 September 2016—Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of contract management.

The course will provide an understanding of:

- Contract management, highlighting processes and techniques and discussing the controls required to manage contracts efficiently
- The interdependency of procurement planning, contract strategy and subsequent management of contracts and supplier enabling staff to optimise contract strategy and management

Linked Courses

> [Guide to Outsourcing and TUPE](#)

> [Improving Supplier Relationships](#)

> [Service Level Agreements & KPIs](#)

Course Content

- The role and scope of contract management
- The contract management process
- Types of contract:
 - Selecting the right contract strategy
 - Balancing risk and flexibility
- Supply positioning and supplier preferencing:
 - Impact on contracts and relationships
- The role of the contract manager
- The downstream contract management process
- Controls:
 - Selection and application
 - Dispute resolution
- Managing risk:
 - Variations
 - Incentives
 - Claims
- Monitoring and measuring performance:
 - Systems, targets and reporting
 - Administration
 - Continuous improvement
- Developing and maintaining interpersonal relationships (assertiveness and trust)

Delivery Style

Presentation of content and trainer-led discussion supported by case study analysis.

Procurement Journey

Zone C (Contract and Supplier Management).

Managing the Tendering Process

Course Type

Technical understanding

Target Audience

Staff involved in the period between issuing an Invitation to Tender (ITT) document and making recommendations for contract award.

Course Duration

1 day

Date and Location

4 February 2016—Glasgow

19 October 2016—Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of the tendering process.

The course will provide an understanding of:

- The importance of the invitation to tender document
- How to deal with tender enquiries
- The process for evaluating tenders
- The key elements of contract recommendations

Linked Courses

> [EU Supplier Selection and Award Criteria](#)

> [Cost/Price Analysis](#)

Course Content

- The legal status of tenders
- Public accountability
- The ITT document:
 - The purpose of an ITT document
 - Key components of an ITT document
 - Preparing and issuing an ITT document
 - Consequences of a poorly drafted ITT document
 - Managing alterations to an ITT document
- Tender Return Period:
 - “Open” supplier meetings, managing clarifications from tenderers, receiving and opening tender documents—security, distributing tenders – confidentiality
- Tender Evaluation:
 - Assembling a tender evaluation team, preparing a tender assessment plan/documentation, assessing quality and commercial criteria, methods of scoring tender prices, post tender clarifications and negotiation
- Contract award:
 - Recording the outcome of a tender assessment, preparing a report and recommendation for contract award, standstill periods, preparing for a supplier de-briefing session

Delivery Style

Presentation of content and trainer-led discussion supported by case study analysis.

Procurement Journey

Zone B (Tender)

Service Level Agreements and KPIs

Course Type

Awareness

Target Audience

Procurement and non-procurement professionals who wish to explore the use of service level agreements (SLAs) and key performance indicators (KPIs).

Course Duration

1 day

Date and Location

18 May 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of SLAs and KPIs.

The course will provide an understanding of:

- The use of SLAs and KPIs in different scenarios
- The capability to use SLAs and KPIs effectively
- The relationship between performance management and supplier development

Linked Courses

- > Contract Management
- > Improving Supplier Relationships
- > Specification Writing

Course Content

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

Delivery Style

Presentation of content and trainer-led group discussions.

Procurement Journey

Zone C (Contract—Contract and Supplier Management)

Specification Writing

Course Type

Practical application

Target Audience

Procurement and non-procurement managers who have a key input to developing specifications to be incorporated into tender documents.

Course Duration

1 day

Date and Location

10 May 2016—Glasgow

1 November 2016—Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of specification writing for tender documentation.

The course will provide an understanding of:

- Various types of specification
- How to distinguish between conformance and performance specifications
- Who is responsible for specification writing within tender documents
- The impact of poorly drafted specifications
- How to avoid common aspects of specification that confuse and lead to poorly executed contracts

Linked Courses

> Contract Management

> Managing the Tendering Process

> Service Level Agreements & KPIs

Course Content

- Definition of a specification
- What goes wrong?
 - Good and bad specifications
- Types of specification
- Impact on contract management
- Accuracy and clarity
- Hints and tips on drafting clear specifications
- Setting SMART measures
- Developing a specification
- Key elements of a specification:
 - Conformance vs. performance specifications
 - Outcome/output based specifications
 - Sustainability and specifications
- KPIs and specifications
- Exercise in drafting a specification
- Procurement’s role in specification writing:
 - Influencing specifications
 - Conflict vs. terms and conditions

Delivery Style

Presentation of content and trainer-led discussion supported by interactive case study and group exercises.

The afternoon session of this course is workshop based and requires delegates to write a specification against a recommended template. Delegates are encouraged to bring a real-life specification writing issue with them for a simple product or service.

Procurement Journey

Zone A (Develop Documents – Specification)

Supply Market Analysis

Course Type

Practical application

Target Audience

Procurement staff involved in the development of commodity or project-based procurement strategies which require market analysis techniques.

Course Duration

1 day

Date and Location

8 November 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of supply market analysis.

The course will provide an understanding of:

- The nature of markets and the forces which shape market competition and buyer and seller behaviour
- How to apply market analysis tools and techniques to build an accurate and informed picture of market capability and characteristics
- How to use the results of market analysis to develop a procurement strategy

Linked Courses

> Supports a range of other training courses

Course Content

- Markets and the forces which shape market competition and buyer and seller behaviour:
 - Market structure: suppliers, capability, geography, segmentation by product and customer
 - External influences: PESTLE analysis, Porter’s 5 forces
 - Market analysis: SWOT, market share, supply chains
 - Pareto analysis: distinguishing high and low value commodities
 - Supply positioning matrix: distinguishing commodities by value and risk as the first step to optimising procurement strategy
 - Supplier analysis: cost drivers
 - Financial and strategy analysis: assess financial performance in the context of suppliers’ medium to long term goals.
 - Supplier preferencing: suppliers’ positioning of customers and the likely impact on relationships and buyer strategy
- Market management matrix:
 - Inter-relationship between buyer and seller perspectives and the likely consequences

Delivery Style

Presentation of content and trainer-led discussion supported by interactive case study and group exercises.

Procurement Journey

Zone A (Profiling the Commodity—Supply Market Analysis)

Improving Supplier Relationships

Course Type

Technical understanding

Target Audience

Procurement professionals who require an understanding of relationship management and the development both of supplier capabilities and favourable relationships with internal customers.

Course Duration

1 day

Date and Location

15 March 2016—Glasgow

18 October 2016- Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge for improving supplier relationships.

The course will provide an understanding of:

- What is meant by ‘relationship management’
- The need to identify key stakeholders and building appropriate relationships with them
- The need to promote procurements ‘added value’ capability to stakeholders
- The different forms of buyer/seller relationships
- The ‘relationship’ life cycle
- The supplier’s objectives at different parts of the relationship life cycle
- The tools used to analyse a given relationship with a supplier
- Assertiveness and persuasive skills for better interpersonal relationships
- A definition of supplier development

Linked Courses

> Contract Management

> Service Level Agreements & KPIs

Course Content

- The relationship spectrum
- Resolving conflict in relationships
- Working with different relationship types.
- Consequence of bad relationships
- How suppliers see procurement organisations:
 - Supplier customer preference
 - Supplier conditioning
- Marketing management grid (mismatches between buyer and seller behaviours)
 - Organisational buying behaviour
- Inter-personnel skills:
 - Assertiveness, Listening and Persuading
- Supplier Development:
 - Definition
 - Typical development events
 - Post-contract activities

Delivery Style

Presentation of content and trainer-led discussion supported by case study analysis.

Procurement Journey

Zone C (Contract and Supplier Management)

Buying Construction Projects

Course Type

Awareness

Target Audience

Staff who need to acquire or develop an understanding of construction procurement, particularly with regard to the delivery of “works” type projects.

Course Duration

1 day

Date and Location

18 February 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of buying construction projects.

The course will provide an understanding of:

- The construction market and the range of services provided from planning, design and construction through to multi-disciplinary professional services
- The different types of construction contract including model forms and their relationship to payment mechanisms and risk allocation
- How construction projects are managed and in particular, the relationship between project and contract management plus main contractors/sub-contractors
- The importance of construction to the public sector in terms of expenditure and sustainability and the range and history of related government and industry initiatives
- The importance of controlling and managing variations and claims

Linked Courses

> All NEC3 courses listed on page 3

Course Content

- Construction market: key players and capability:
 - employer, consultants, contractors, sub-contractors, project managers, process engineers, hybrids and specialists, equipment and product suppliers, site managers
- Contract types, payment mechanisms and their main characteristics:
 - Lump sum, bill of quantities, target cost, different payment methods, common incentive mechanisms, risk allocation, flexibility of service, scope of service
- Construction and contract management:
 - Management arrangements, roles, responsibilities and relationship to contract strategy
 - Provisions of common standard forms of contract (NEC, ICE, JCT)
 - Common contractual controls and construction risks
 - Managing sub-contractors
- Managing variations and claims
- Government and industry initiatives.
- Scottish Government construction manual
- Procurement’s role in the project team

Delivery Style

Presentation of content and trainer-led discussion supported by group exercises.

Procurement Journey

General application

Contracting for Individual Service Funds (ISF)

Course Type

Technical understanding

Target Audience

Commissioning, contracts, procurement and legal staff involved in the implementation of Option 2 of the Self Directed Support Act.

The implementation of Individual Service Funds impacts on social work professional practice and financial systems and the course is highly relevant to council staff leading on Self Directed Support in these areas.

Course Duration

1 day

Date and Location

4 February 2016—Paisley

21 April 2016—Paisley

Cost (excl. VAT)

- £70 for Local Authority and Associate Member delegates
- £75 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of contracting for Individual Service Funds (ISF).

The course will provide an understanding of:

- The issues which need to be considered prior to putting contractual arrangements into place under Option 2 of the Self-Directed Support (SDS) Act
- How model ISF clauses may assist with this and be adapted for local use.

Course Content

- Background:
 - The legal and policy context
 - Principles behind ISF and how it might work
- Commissioning:
 - The range of options for implementing Option 2 of the SDS Act
 - How to put ISF contractual arrangements in place (procurement options)
 - Identification and engagement with key stakeholders
 - Local care markets and SDS
- The model ISF clauses:
 - Key differences between ISF model clauses and standard social care clauses
 - Factors to consider in adapting the model clauses for local use
 - Changes that may be required in existing social care contracts
- Engagement with stakeholders on ISF:
 - Supported Persons and Carers
 - Providers
 - Social Workers and health staff
 - Infrastructure: finance, IT, legal
- Moving forward:
 - Some lessons from England
 - Where next for developing the model ISF Framework Agreement

Procurement Journey

General application

Delivery Style

Presentation of content and trainer-led discussion supported by interactive group exercises.

Introduction to NEC3 Engineering and Construction Contract (ECC)

Course Type

Awareness

Target Audience

Public sector professionals who require a basic understanding of the NEC3 Engineering & Construction Contract (ECC)

Course Duration

1 day

Date and Location

10 March 2016—Paisley

4 October 2016—Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

The NEC3 Engineering and Construction Contract (ECC) is used for the appointment of a contractor for engineering and construction work, including any level of contractor design responsibility.

On completion of this course delegates will gain a basic knowledge of when to use this form of contract, how to put it together and how to manage it effectively.

The course will provide an understanding of:

- NEC philosophy and principles
- Key contractual elements (the options)
- Contract data and service information
- How to prepare contract information
- Important contract clauses and processes (particularly early warning, communications and compensation events)

Linked Courses

> All NEC3 courses listed on page 3

Course Content (in the context of ECSC)

- Background and principles:
 - Key philosophy of NEC, main objectives and characteristics
- Contract strategies: Elements central to creating a contract including an explanation of the main and secondary options
- Contract documents: Contract documents that need to be produced
- General provisions and the contractor’s responsibilities: Conditions of contract used to manage the projects and roles of the key players
- Time, testing and defects: Management of time and the achievement of the quality standards
- Payment: How payments are assessed and the payment process
- Compensation events: Compensation events and the process for their management
- Title, risks and insurance, termination and dispute resolution: Contract conditions for these aspects

Delivery Style

Delivery will be through a combination of formal presentation and discussion of practical issues.

Delegates should note that although course materials will be provided they will be required to bring their own copy of the ECC

Procurement Journey

General application

Introduction to NEC3 Engineering and Construction Short Contract (ECSC)

Course Type

Awareness

Target Audience

Public sector professionals who require a basic understanding of the NEC3 Engineering and Construction Short Contract (ECSC).

Course Duration

1 day

Date and Location

8 March 2016—Paisley

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

The NEC3 Engineering and Construction Short Contract (ECSC) is for the appointment of a contractor for straightforward, low risk engineering and construction work.

On completion of this course delegates will gain a basic knowledge of when to use this form of contract, how to put it together and how to manage it effectively.

The course will provide an understanding of:

- NEC philosophy and principles
- Key contractual elements (the options)
- Contract data and service information
- How to prepare the contract information
- Important contract clauses and processes (early warning, communications and compensation events)

Linked Courses

> All NEC3 courses listed on page 3

Course Content (in the context of ECSC)

- Background and principles: Key philosophy of NEC, main objectives and characteristics
- Contract strategies: Elements central to creating a contract including an explanation of the contract forms
- Contract documents: Contract documents that need to be produced
- The key ECSC provisions: Conditions of contract that are used to manage the project:
 - Contractor responsibilities
 - Time and defects
 - Payment and compensation events
 - Insurance
 - Termination and dispute resolution
- Summary
 - Q&A

Delivery Style

Delivery will be through a combination of formal presentation and discussion of practical issues.

Delegates should note that although course materials will be provided they will be required to bring their own copy of the ECSC.

Procurement Journey

General application

Introduction to NEC3 Professional Services Contract (PSC)

Course Type

Awareness

Target Audience

Public sector professionals who require a basic understanding of the NEC3 Professional Services Contract (PSC)

Course Duration

1 day

Date and Location

9 March 2016—Paisley

5 October 2016—Edinburgh

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

The NEC3 Professional Services Contract (PSC) is for the appointment of a consultant for any type of professional service.

On completion of this course delegates will gain a basic knowledge of when to use this form of contract, how to put it together and how to manage it effectively.

The course will provide an understanding of:

- NEC philosophy and principles
- Key contractual elements (the options)
- Contract data and the scope
- The roles of the key players
- Important contract clauses and processes (early warning, the programme, the risk register, communications, compensation events and task orders)

Linked Courses

> All NEC3 courses listed on page 3

Course Content (in the context of PSC)

- Background and principles: key philosophy of NEC, main objectives and characteristics
- Contract strategies: elements central to creating a contract including an explanation of the main and secondary options
- Contract documents: contract documents that need to be produced
- General provisions and the parties’ responsibilities: provisions used to manage the service and the roles of the parties
- Time: management of time and the achievement of the quality standards
- Payment: how payments are assessed and the payment process
- Compensation events: compensation events and the process for their management
- Title, risks and insurance, termination and dispute resolution: contract conditions for these aspects

Delivery Style

Delivery will be through a combination of formal presentation and discussion of practical issues.

Delegates should note that although course materials will be provided they will be required to bring their own copy of the PSC.

Procurement Journey

General application

Introduction to the NEC3 Supply Contract (SC)

Course Type

Awareness

Target Audience

Public sector professionals who require a basic understanding of the NEC3 Supply Contract (SC).

Course Duration

1 day

Date and Location

4 May 2016—Paisley

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

The NEC3 Supply Contract (SC) is for the appointment of a supplier of high value goods that are to be used for almost any purpose and may be sourced from anywhere in the world, including any level of supplier design responsibility.

On completion of this course delegates will gain a basic knowledge of when to use this form of contract, how to put it together and how to manage it effectively.

The course will provide an understanding of:

- NEC philosophy and principles
- Key contractual elements (the options)
- Contract data, goods information and supply requirements
- The roles of the key players
- Important contract clauses and processes (early warning, the programme, the risk register, communications and compensation events)

Linked Courses

> All NEC3 courses listed on page 3

Course Content (in the context of SC)

- Background and principles: key philosophy of NEC, main objectives and characteristics
- Contract strategies: SC application and structure including an explanation of the options
- Contract documents: contract documents that need to be produced
- General provisions and supplier responsibilities: conditions of contract used to manage the supply and roles of the key players
- Time, testing and defects: management of time and the achievement of quality standards
- Payment: how payments are assessed and the payment process
- Compensation events: compensation events and the process for their management
- Title, risks and insurance, termination and dispute resolution: contract conditions for these aspects
- Summary: Q&A

Delivery Style

Delivery will be through a combination of formal presentation and discussion of practical issues.

Delegates should note that although course materials will be provided they will be required to bring their own copy of the SC.

Procurement Journey

General application

Introduction to NEC3 Term Service Contract (TSC)

Course Type

Awareness

Target Audience

Public sector professionals who require a basic understanding of the NEC3 Term Service Contract (TSC)

Course Duration

1 day

Date and Location

2 November 2016—Paisley

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

The NEC3 Term Service Contract (TSC) is for the appointment of a contractor for any type of commercial service for a period of time.

On completion of this course delegates will gain a basic knowledge of when to use this form of contract, how to put it together and how to manage it effectively.

The course will provide an understanding of:

- NEC philosophy and principles
- Key contractual elements (the options)
- Contract data and services information
- The roles of the key players
- Important contract clauses and processes (early warning, the programme, the risk register, communications, compensation events and task orders)

Linked Courses

> All NEC3 courses listed on page 3

Course Content (in the context of TSC)

- Background and principles: key philosophy of NEC, main objectives and characteristics
- Contract strategies: elements central to creating a contract including an explanation of the main and secondary options
- Contract documents: contract documents that need to be produced
- General provisions and the Contractor’s responsibilities: conditions of contract used to manage the projects and roles of the key players
- Time, testing and Defects: management of time and the achievement of the quality standards
- Payment: how payments are assessed and the payment process
- Compensation events: compensation events and the process for their management
- Title, risks and insurance, termination and dispute resolution: contract conditions for these aspects

Delivery Style

Delivery will be through a combination of formal presentation and discussion of practical issues.

Delegates should note that although course materials will be provided they will be required to bring their own copy of the TSC.

Procurement Journey

General application

IT Systems and Software Procurement

Course Type

Awareness and practical application

Target Audience

Professionals involved or about to become involved in IT software and systems procurement.

Course Duration

1 day

Date and Location

12 October 2016—Glasgow

Cost (excl. VAT)

- £165 for Local Authority and Associate Member delegates
- £185 for Non-member delegates
- On-demand quote for in-house “closed” courses

Purpose

On completion of this course delegates will gain knowledge of IT systems and software procurement.

The course will provide an understanding of:

- The particular characteristics of IT software and systems application and their role in wider business process re-engineering
- The risks commonly associated with IT software and systems projects and explore procurement risk management options

Linked Courses

> [Guide to Outsourcing and TUPE](#)

Course Content

- Overview of software and systems in terms of scale, scope, risks, markets
- IT as a business process enabler including impacts on operational processes and practice
- Standard product or bespoke service
- Advantages and disadvantages of open source software
- Commonly occurring risks including examples of major public and private sector IT projects
- Best practice IT procurement process and supporting tools including an overview of OGC recommended procurement and related project management process, and contractual models:
 - Standard software licence terms, intellectual property rights, patents, copyright and trade marks, Escrow terms, other standard and significant IT service terms
- Ensuring sound governance and stakeholder engagement in major IT enabled change management programmes
- An overview of outsourcing and impacts on people including application of TUPE
- Understanding business needs and managing key internal and external relationships

Delivery Style

Presentation of content supported by tutor-led discussion and case studies.

Procurement Journey

General application

Scotland Excel—On-Demand Courses

Scotland Excel’s ‘On-Demand’ training offers a range of benefits to our customers when delivered in-house. In-house training usually costs less per employee than attendance on “open” courses if the maximum number of delegates per course can be achieved. In-house training can avoid the cost of delegates travelling and catering provision.

Having employees from a single customer organisation/location normally offers more in-depth training discussion and debate on issues that are important to your organisation. There is also the potential for courses to be designed bespoke to each customer.

Our ‘On-Demand’ training provides a range of courses at an introductory, practical and advanced level. If delivered in-house they can be aligned to the working schedule of staff and provide a greater opportunity for team building and enhancing internal relationships.

Category Management

Course	Summary of Course Content	Duration
Introduction to Category Management	<ul style="list-style-type: none"> • The process of category management and related resource and governance arrangements. • Establishing the category structure, related spend analysis and identification of opportunity. • The role of strategic procurement (sourcing). 	1 day
Developing a Category Procurement Strategy	<ul style="list-style-type: none"> • Brief overview of category management. • Strategic procurement (sourcing) process in detail. • Structured use of analytical tools within the procurement process including market, supplier and supply chain analyses. • Strategic option appraisal. 	2 days

Negotiation

Course	Summary of Course Content	Duration
Introduction to Negotiation	<ul style="list-style-type: none"> • Using negotiation to reach agreement. • 5 key styles of negotiation. • 6 key phases of the process. • 7 useful tactics. 	1 day
Practical Negotiation	<ul style="list-style-type: none"> • Highly interactive course using BlueArc’s unique video role play methodology. • Specialist feedback tutor provides group and individual feedback between negotiation sessions. • Allows delegates to practice their negotiation skills using a single supplier case study. 	2 days
Advanced Negotiation	<ul style="list-style-type: none"> • Highly interactive course providing an opportunity to test and hone negotiation skills using an intensive twin supplier case study and BlueArc’s unique video role play methodology. • Can be used as a coaching opportunity to support planned negotiations. 	3 days

EU Procurement

Course	Summary of Course Content	Duration
Conducting a Competitive Negotiation	<ul style="list-style-type: none"> • Exploration of the new EU competitive procedure with negotiation with the following elements illustrated through use of a case study. • Drafting of the specification to identify aspects open to negotiation. • Planning, timescales and targets – use of negotiation theory. • Conducting the post-tender negotiation and maintaining a level playing field. • Interim evaluations and de-selection. • Final tender evaluations. 	1 day
Conducting a Competitive Dialogue	<ul style="list-style-type: none"> • Exploration of the EU competitive dialogue procedure through use of a case study. • Drafting initial objectives and drafting of contract documentation. • Initial submission of outline solutions and refinement through the dialogue process. • Interim evaluations and de-selection. • Final tender evaluations. 	1 day
Introduction to the Concessions Directive	<ul style="list-style-type: none"> • What constitutes a concession contract? • Current treatment of works and services concessions contracts. • Rationale for change. • Key differences between the 2014 Public and Concessions Directive. • Effective use of concession contracts. 	1 day
Creating an Innovation Partnership	<ul style="list-style-type: none"> • What is an innovation partnership? • When should we consider using one? • Specific provisions of the 2014 Directive. • One or many partners? • Use of the research and innovation process. • Choosing the partner(s). 	1 day

Project Management

Course	Summary of Course Content	Duration
Project Management for Procurement	<ul style="list-style-type: none"> • Project management structures and process. • Linking procurement, project management and the gateway review process. • Application of project management tools to manage quality, time and money. 	1 day



Finance

Course	Summary of Course Content	Duration
Determining the Total Cost of Ownership	<ul style="list-style-type: none"> • Total cost of ownership (TCO) concept. • Costing systems and the business environment. • Stages in the TCO process. • Application of discounted cash flow to TCO. 	1 day
Introduction to Leasing	<ul style="list-style-type: none"> • Types of leasing agreement. • Lease accounting and taxation considerations. • Overview of leasing agreements and methods of pricing. • Risks associated with leasing. 	1 day
Business Finance for Procurement Professionals	<ul style="list-style-type: none"> • Exploration of key financial statements; balance sheet, profit and loss account and cash flow statement. • Use of key financial ratios. • Principles of investment appraisal and life cycle costs. • Setting and monitoring of budgets. 	1 day
Understanding Insolvency	<ul style="list-style-type: none"> • Definitions of insolvency. • An understanding of why businesses fail. • An indication of warning signs of impending failure. • An understanding of the various types of insolvency procedures and their characteristics. • An awareness of typical contract clauses that protect against the risk of insolvency. 	1 day

Legal

Course	Summary of Course Content	Duration
Fundamentals of Contract Law	<ul style="list-style-type: none"> • Exploration of key aspects of the law of contract from contract formation to remedies for breach. • Related statutory provisions. • Management of legal risk. 	1 day
TUPE—Outsourcing and Change of Supplier	<ul style="list-style-type: none"> • Exploration of the TUPE regulations and consequences of infringement. • Application to outsourcing contracts and re-tendering of existing contracts. 	1 day
Competition Law and Cartels	<ul style="list-style-type: none"> • Anti-competitive practices. • Competition law enforcement and relevant authorities. • Collusion, cartels, abuse of a dominant position, monopolies and mergers. • Compliance policies and procedures. 	1 day



Materials Management

Course	Summary of Course Content	Duration
Inventory Management	<ul style="list-style-type: none"> • Inventory management models and practice. • Use of data in inventory management and the measurement of performance. • Interaction of procurement, financial and inventory management processes. 	1 day
Warehouse Management	<ul style="list-style-type: none"> • Exploration of warehousing operations and administration including legal aspects, job roles, equipment and facilities. • Application of lean processes to layout, logistics and waste. • Role of IT systems. 	1 day

Workshops

Course	Summary of Course Content	Duration
Tender Evaluation Workshop	<ul style="list-style-type: none"> • Differentiate selection, short listing and award criteria. • Explore application of award criteria and weightings. • Explore the impact of award criteria on supplier's tender strategy. • Use a variety of evaluation models. • The tutor will guide delegates through the process of selecting and weighting award criteria and subsequent evaluation using a tender from the host organisation. 	1 day



Training Need Assessment

BlueArc has developed an online multiple choice knowledge assessment questionnaire to help organisations identify gaps in procurement knowledge. It can be used to design training programmes, to build individual development plans and as an assessment tool in support of the recruitment process.

The questionnaire has been used by CIPs as a means of assessing professional development needs of those applying for membership of the institute. As a result, BlueArc now has a database of over 12,000 procurement practitioners who have completed the questionnaire. This enables them to benchmark individuals and organisations against average and best-in-class performance for the procurement profession as a whole or, for example, by sector or region.

The questionnaire can be completed online from any internet enabled device in about two or three hours. Each member of staff completing the questionnaire receives a personalised report explaining their assessment against 13 procurement competencies. The organisation commissioning the assessment receives a group report showing individual and group performance and, typically, drawing comparisons with the average and the top ten percentile for the database as a whole.

The questionnaire has been used successfully by Scotland Excel and by Glasgow City Council to identify procurement skills development needs.

Please contact Helene Holden for further information and a tailored quotation by email: training@scotland-excel.org.uk or by telephone 0141 618 7436.

Training Calendar February–November 2016

Key

- EU Procurement
- Finance for Procurement
- Legal Aspects
- Operations and Practice
- Relationships
- Specialist Procurement

February 2016

Date	Course Topic and Location
4	Managing the Tendering Process—Glasgow
4	Contracting for Individual Service Funds—Paisley
16	Contract Management—Glasgow
18	Buying Construction Projects—Glasgow

March 2016

Date	Course Topic and Location
8	NEC3 Introduction to the Engineering Construction Contract-Short Contract—Paisley
9	NEC3 Professional Services Contract—Paisley
10	NEC3 Introduction to the Engineering Construction Contract—Paisley
15	Improving Supplier Relationships—Glasgow

April 2016

Date	Course Topic and Location
12	Contract Law—Glasgow
13	Exploring Terms and Conditions of Contract—Glasgow
21	Contracting for Individual Service Funds—Paisley
26	Guide to Outsourcing and TUPE—Glasgow

May 2016

Date	Course Topic and Location
4	NEC3 Introduction to the Supply Contract—Paisley
10	Specification Writing—Glasgow
12	Total Cost of Ownership—Glasgow
17	Supplier Debriefing—Glasgow
18	Service Level Agreements and Key Performance Indicators

June 2016

Date	Course Topic and Location
7	Cost/Price Analysis—Glasgow

July 2016

Date	Course Topic and Location
	Training courses available on request.

August 2016

Date	Course Topic and Location
	Training courses available on request.

September 2016

Date	Course Topic and Location
20	Contract Management—Edinburgh

October 2016

Date	Course Topic and Location
4	NEC3 Introduction to the Engineering Construction Contract—Edinburgh
5	NEC3 Professional Services Contract—Edinburgh
11	EU Supplier Appraisal and Contract Award Criteria—Glasgow
12	IT Systems and Software Procurement—Glasgow
13	EU Frameworks and Mini-Competitions—Glasgow
18	Improving Supplier Relationships—Edinburgh
19	Managing the Tendering Process—Edinburgh
25	Exploring Terms and Conditions of Contract—Edinburgh

November 2016

Date	Course Topic and Location
1	Specification Writing—Edinburgh
2	NEC3 Introduction to the Term Service Contract—Paisley
8	Supply Market Analysis—Glasgow