NWUPC

North Western Universities Purchasing Consortium

Delivering value through responsible procurement

CATEGORY GROUP MEMBERS PACK

January 2022

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A Brief History of the North Western Universities Purchasing Consortium 1976 to 2020

This paper addresses the major developments and some external circumstances that have influenced and/or determined the evolution of the Consortium over the last four decades. Dates and details from the early years are based more on oral history than actual documentation, especially before the establishment of the not for profit company in 2000.

Establishment and early period 1970 to 1987

A now disbanded organisation called AIMS (Academic Institutions Management Services) an in- sector management consultancy organisation similar to the existing SUMS (Southern Universities Management Services) established a purchasing committee in 1976. Early members were the universities of Liverpool (who provided the staff, payroll, accommodation and support services), Manchester, Keele, Lancaster, Salford, Bangor and Birmingham (who later left). A full time co-ordinator of the purchasing group was appointed in 1986 and the NWUPC designation adopted to differentiate it from AIMS. Both AIMS and NWUPC were unincorporated associations meaning all members were joint and severally liable for any liabilities these bodies incurred.

1987 to 1999

The purchasing coordinator established the Commodity Group structure of the Consortium where technical and operational staff from relevant departments/faculties of member institutions met to share contracts and information. An assistant to the co-ordinator was appointed in 1992, partly to handle the increased membership as the ex-polytechnics became what was termed new universities and joined NWUPC. The scale of expenditure from members via the Consortium increased and in 1997 NWUPC formally separated from AIMS and NWUPC appointed its first purchasing professional Director. Contracts however were done by member institutions on behalf of NWUPC and the other members, with Liverpool and Manchester playing the major roles.

By 1999 NWUPC had 19 HEI members and was undertaking contracting in its own right. A new Managing Director (the writer) was appointed in 1999. Major concerns of members, the unincorporated joint liability structure of the Consortium, the strategic controlling arrangements and the subscription funding model were then addressed. 1999 was also the first year the Consortium held an annual conference, free to staff from members and funded by a suppliers exhibition; these have continued each year except when NWUPC organises the Conference on University Purchasing – COUP.

2000 to 2007

On 1st August 2000 the Consortium was incorporated as a not for profit company owned by its full members (defined as higher education institutions) with their liability limited to £1. The Management Council, the senior managers from members with overall responsibility for procurement in their institutions (normally Directors of Finance), that is the governing body, decided to elect a smaller group from amongst themselves to form a Board of Directors of the new Company - NWUPC Ltd - with the employed director becoming the Managing Director (and Company Secretary).

The new Company changed its funding model so that it generated marketing premiums (or rebates) from suppliers on the contracts it lets on behalf of members. This new model took a while to catch on with the other HE purchasing consortia however, with the exception of the Southern Universities Purchasing Consortium that remains a part of SUMS, all of the other English based consortia have now adopted similar corporate and funding models pioneered by NWUPC; some with our direct help.

Between 2000 and 2007 NWUPC won grants from HEFCE under the Good Management Practice and the Leadership, Governance and Management funding initiatives to provide NVQ training in Procurement to both purchasing and operational staff across the sector. The Consortium has trained over 1,000 people via its varied CPD and NVQ provision and was recognised as an NVQ Centre of Excellence by CIPS.

Subscriptions, over £16k for a large member in the late 1990s, were reduced to £6,300 for 2007/8. Income generated rose from £20k in 1998 to £367k in 2007. Income generation exceeded total subscriptions fees for the first time in 2001 and by more than 3 times in 2007. Of note was the Conference on University Purchasing (COUP) held at Manchester University in 2001 but run commercially by NWUPC; this generated a surplus about £100k giving the Company a level of financial security that underpinned an expansion in activities. Spend by members via NWUPC rose from £21m in 1999 to over £59m in 2007.

2007 to 2014

The establishment of a new Scottish purchasing consortium led to the two Northern Ireland universities joining NWUPC in 2007. NWUPC has 22 full members and a number of associate and affiliate members who can access contracts but have no controlling interest. Subscriptions for large Members are under £5k whilst income generation exceeds £700k; spend on agreements 2012/13 was about £179m. NWUPC ran COUP in 2013 in Liverpool and generated over £150k surplus.

Whilst the other English HE consortia have emulated many of NWUPC's changes one attribute remains unique; the agreement by members to pre-commit to agreements which the Consortium intends to do. This model has been proven to generate better value for money for members than the more common public sector approach of letting agreements and then hoping organisations use them. It makes the Consortium focus on the needs of its members and enables agreements to be tailored to regional, sub-regional and in some cases institutional specific requirements.

2014 to present

Since 2018, NWUPC has 24 full members with The Liverpool Institute for Performing Arts and University of Wolverhampton joining as members in 2017 and 2018 respectively. NWUPC also offers associate and affiliate membership opportunities for other relevant public bodies or organisations. Subscriptions continue to remain under £5k per year. Membership of NWUPC brings about a wide range of benefits and savings opportunities for its members.

Over the past four decades the Consortium has delivered value for money contracts, training, conferences, and other cost saving initiatives to and for its members whilst playing a leading part in the development of collaborative procurement across the HE sector. Its latest success is achieving, for the second time, the Investors in People Platinum level in 2020

Julie-Ann Garton
Managing Director
NWUPC Ltd

An Introduction to Category Groups

A Category Group is a 'Committee comprised of representatives from each member institution which meets to drive forward the contracting programme of the consortium and share best practice in its particular area of expertise'. Category Groups operate within the formal structure of NWUPC Ltd.

The Category Manager is responsible for working with Category Groups to establish and maintain contracts for goods and services. The 13 Category Groups are:

- Audio Visual
- Catering
- Computing
- Domestic Supplies and Services
- E-Marketplace
- Estates
- Furniture and Soft Furnishings
- Laboratory Supplies
- Library Services
- Office Solutions
- Professional Services
- Telecommunications
- Travel

The Category Group are responsible for checking which category areas are tendered and have complete ownership of the activities within their area.

Sub-groups are selected from the Category Group as needed, to work with the Category Manager to put together the Specification and Service Level Agreement for each proposed contract which meets the requirement of all parties. All Category Group members are surveyed to establish their institution's commitment and requirements. The sub-groups are involved at each stage of the tendering process and have input to every decision. They are instrumental in the technical evaluationand operational management of contracts.

It is the responsibility of the Category Manager to coordinate tendering activities and work with the Category Groups and suppliers to ensure the best value for money and service for the members.

It is the responsibility of all Group members to ensure that information about contracts and NWUPC is distributed in their institution. It is vital to pass information from the institution to NWUPC.

The role of Membership Services Coordinator is to ensure that Category Group have the fullest support to achieve their aim of getting best value for our members.
The Membership Services Coordinator is Secretary to each Category Group.

Category Group members are nominated by their institutions. There is not a fixed term of office. It is a mark of confidence that a person is nominated to a Group, but there are also responsibilities, to disseminate information from the Group meeting in the member's institution, and to report issues in the institution back to the Group. Regular attendance is vital to ensure that the Group makes the best decisions for all members. Category Group members must be a two-way channel of communication between their institution and the Group. Members must monitor contracts once they are established to ensure the Service Level Agreements are met and report success and problems to the Group and the Category Manager.

The officers of each Group are the Chair and Deputy Chair. The Chair is elected by the Group and may serve more than one term. Deputy Chairs are also elected, with no restriction of their term of office, and may step up to become Group Chair.

The Group Chair must give each group member the opportunity to represent their views. Members may join in subgroups to assist with the tendering process or become a Category Manager liaising between the Group and a supplier. Regular review meetings with the supplier are held for every contract.

Group meetings are held twice or three times each year and meetings are rotated amongst all the member institutions. The NWUPC Central Team assists in the organisation of meetings.

The Category Group meetings are friendly, not intimidating and provide many opportunities for networking.

The terms of reference offer help and guidance for Category Group members.

Terms of Reference for Category Groups

1. To agree a programme of category and contracting strategies, with the NWUPC Category Manager(s) to ensure the Consortium makes best use of its purchasing power. Ensure specifications are appropriate and meet genuine requirements of members to ensure maximum appropriate commitment to agreements.
2. To draft and agree specifications that meet the genuine requirements of member institutions as well as provision of timely support and information to NWUPC Officers as required.
3. To implement a proactive approach to price management so that price increases become the exception and opportunities are sought to reduce prices.
4. To monitor and report on suppliers' performance with a view to ensure any problems are identified and addressed..
5. To report value for money benefits gained by membership of NWUPC.
6. Develop and implement marketing strategies that enable agreements and preferred suppliers to be actively promoted.
7. Produce a report on the Consortium past year's activities for the NWUPC Annual Report including usage of agreements, value for money obtained, reductions in the supplier base and members attendance at meetings.

Membership

Category Groups will compose of representatives, nominated by NWUPC Council members, from each full member institution, a member of the Central Team responsible for contracting and the Membership Services Coordinator who will be the group's secretary. Guests and visitors can attend meetings with the agreement of the Chair. The Chair and Deputy Chair of the category group will be elected by and from its members and will normally serve a three-year term but can be re-elected by the group. The Deputy Chair can but does not have to, succeed the Chair with the Group's approval.

Meetings

The Category Groups will meet at least once a year; the number of meetings will be agreed by the Chair and will depend on the contracting timetable. Minutes of meetings will be circulated to institutions within a reasonable period from date of the last meeting.

Ethics

Category Groups will keep all information, including prices, terms and conditions, marketing premiums, rebates and the actions, debates and decisions during a tendering exercise

- Not make decisions biased by personal opinions or relationships
- Act with integrity, conducting all dealings professionally and fairly
- Ensure promises are kept both orally and where required in writing
- Apply our ethical principles across the supply chains impacting on HE
- Follow the Chartered Institute of Purchasing and Supply's Ethical Code

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Terms of Reference for Category Group Members

1. Category Groups are the driving force in NWUPC responsible for the contracting programme and other value for money initiatives. NWUPC Council members will nominate Category Group members for their institution.
2. Category Groups will compose of a representative and deputy from each full member institution, a member of the Central Team responsible for contracting and the Membership Services Coordinator who will be the group's secretary. Guests and visitors can attend meetings with the agreement of the Chair.
3. The Chair and Deputy Chair of a Category Group will be elected by and from its full members and will normally serve a three-year term but can be re-elected by the Group. The Deputy Chair can, but does not have to, succeed the Chair with the Group's approval.
4. Group members will keep all information, including prices, terms and conditions, marketing premiums, rebates and the actions, debates and decisions during a tendering exercise and following award of contract, strictly confidential.
5. Category Group members should have responsibility for, or work in, the areas covered by the particular Category Group. Individuals may be members of more than one group.
6. Members agree and support a programme of contracting/negotiations/purchasing strategies to ensure Consortium makes best use of its purchasing power and to ensure maximum commitment to agreements in their institutions.
7. Draft and agree specifications that are appropriate and meet the genuine requirements of member institutions. Provide timely support and information as required.
8. Groups will organise themselves, via the Chair, along lines that maximise their effectiveness e.g. working groups for contracting exercises etc.
9. Monitor suppliers' performance so that suppliers who do not deliver satisfactory performance in terms of overall value for money are identified and any problems addressed.
10. Monitor and report value for money benefits gained by members of NWUPC.
11. Consider how agreements and preferred suppliers can best be marketed in their institutions and work appropriately with the Consortium Officers and Category Group members to develop and implement marketing strategies.
12. Attend all group meetings and any working groups etc. or send nominated deputies.
13. Members must understand and meet their responsibilities as defined in the Terms of Reference and CIPS Code of Conduct.

Terms of Reference for Category Group Chairs

1. Agree draft programme of contracting/purchasing strategies, with the NWUPC Category Manager to ensure the Consortium makes best use of its purchasing power. Ensure specifications are appropriate and meet genuine requirements of members to ensure maximum appropriate commitment to agreements.
2. Chairs will be from Full Member institutions and normally serve a three-year term they can however be elected for further terms by the Category Group.
3. Working with the NWUPC Central Team to promote the work of the Group including presentations by suppliers, training, adoption of new technologies such as e-tendering, e-procurement etc. and any other methods that provide value for member institutions.
4. Ensure that the Category Group meets its Terms of Reference and members understand and meet their responsibilities and to organise the Category Group along lines that maximise its effectiveness e.g. working groups for contracting exercises etc.
5. Working with the NWUPC Central Team to ensure Category Group members provide timely support and information for the development of programmes relating to contracting/negotiations and purchasing strategies.
6. Working with the NWUPC Contracts Team to ensure that suppliers' performance is monitored; and to ensure that suppliers who do not deliver satisfactory performance are not recommended to members. Also, to ensure that benefits in value for money are reported at group meetings.
7. With the advice of NWUPC Category Managers implement a proactive approach to price management so that price increases become the exception and opportunities are sought to reduce prices.
8. Work with the Consortium Officers and Category Group members to develop and implement marketing strategies so that agreements and preferred suppliers can be activity promoted.
9. Working with the NWUPC Contracts Team to ensure suitable representation from each institution at meetings either by group members or by nominated deputies.
10. Write a report on the Group's past year's activities for the NWUPC Annual Report to include usage of agreements, value for money obtained, reductions in the supplier base and the Category Group representatives' attendance at meetings.
11. Should any circumstances arise that require a quick decision from the Chair be empowered to take Chair's action in consultation with the NWUPC Category Manager and/or Managing Director.

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Terms of Reference, Heads of Procurement Group

Role of the Heads of Procurement Group

Provide strategic leadership in the development, implementation, and sustainability of procurement amongst members.

1. To be a forum for sharing of good practice and professional development.
2. To be consulted on the annual category group plans.
3. To be informed by exception of risks or issues arising from the category groups such as delays in tendering or supplier performance and to advise on their prevention and mitigation.
4. To be informed on resources required to support NWUPC's programme of activities
5. Provide advice, support and assistance to NWUPC in the implementation of the strategy/programme of activities

Role of Individual Members

- Attend each meeting or send a proxy
- Engage outside of the meetings via the shared email list
- Be committed to the outcomes, engage actively and be an advocate

Communication

- Formal meetings three times a year
- Other meetings based on specific topics as required
- Emails via the shared email list

Current Category Groups and Frameworks

Audio Visual	
Category Manager **Paula Lister**	Email – paula.lister@nwupc.ac.uk Tel - 0161 234 8006
Framework Agreements:	
Audio Visual Equipment and Installation Services Broadcast Equipment Photographic Equipment & Consumables	

Computing	
Category Manager **Paula Lister**	Email – paula.lister@nwupc.ac.uk Tel - 0161 234 8006
Framework Agreements:	
Apple Equipment & Services Data Centre Management Desktops & Notebooks (NDNA) HE Networking (HENSS) IT Equipment Reuse, Recycling & Disposal IT Related Accessories & Parts (ITRAP) MFD & Digital Transformation Solutions MFD Reprogaphics Software Licence Resellers (SLRA) Servers, Storage & Solutions (SSSNA) Shared Datacentre Virtual Learning Environment (VLE) Vulnerability Assessment & Information Services	

Domestic Supplies and Services

Category Manager **Matthew Porter**	Email – matthew.porter@nwupc.ac.uk Tel - 0161 234 8013

Framework Agreements:

Building Cleaning

Cleaning & Janitorial Supplies

Cleaning Equipment - Supply and Maintenance

Courier Services

Deep cleaning and specialist cleaning services

Mail Services

Recycling Bins & Street Furniture

Soft Furnishings

Washroom Services including Period Dignity Solutions

White Goods and Associated Electrical Appliances

Window Cleaning Services

Estates & Facilities Management

Category Manager **Helen Dodd-Williams**	Email - Helen.DoddWilliams@nwupc.ac.uk Tel - 0161 234 8012

Framework Agreements:

Air Filters, Associated Products and Services

Building Cleaning

Building Materials, Tools & Hardware Supplies

Cash and Valuables in Transit

CCTV Systems and Equipment

Doors Maintenance, Repair and Installation Services

Electrical Vehicle Charging

Estates & Facilities Management

Electrical Materials

Flexible Energy Supply

Electronic Components

Entrance & Access Control Systems

Fire Alarms, Detection and Suppression Systems

Firefighting Equipment and Associated Services

Fixed Wire (FWT) Testing

Gas Equipment

Grounds Maintenance EFM3140 CPC

Lifts - Expired 30/03/2021

Lift Installation, Maintenance & Consultancy - Started 04/05/2021

Mechanical, Electrical & Building Fabric Maintenance Services

Paint and Decorating Supplies

Personal Protection Equipment (PPE)

Plumbing

Portable Appliance Testing (PAT)

Removal and Relocation Services - Started 22/02/2021

Security Services Framework

Signs & Signage

Synthetic Sports Facilities

Temporary Structures

Washroom Services including Period Dignity Solutions

Waste Management Services (Sustainable)

Water, Wastewater and Ancillary Services

Water Quality Management

Window Cleaning Services

Furniture and Soft Furnishings

Category Manager **Matthew Porter**	Email – matthew.porter@nwupc.ac.uk Tel - 0161 234 8013

Framework Agreements:

Floor Coverings

Furniture _ NW

Furniture Reuse & Recycling

Removals & Relocations

Soft Furnishings

Sports, Fitness & Gym

White Goods and Associated Electrical Appliances

Laboratory Supplies

Category Manager **Sarah Dye**	Email - sarah.dye@nwupc.ac.uk Tel - 0161 234 8016

Framework Agreements:

3D Printers, 3D Scanners and Associated Equipment

Antibodies & Sera (and other related matrices) IRLA

Electronic Components

High Value Laboratory Equipment (HVLE)

IUPC Lab Gases

Laboratory Consumables & Chemicals IRLA

Laboratory Equipment Supply, Installation, Delivery and Post Installation Services

Lasers and Associated Equipment (Dynamic Purchasing System)

Life Science Reagents, Kits & Consumables

Life Science Equipment

Mass Spectrometry & Chromatography Equipment

Microscopes & Imaging Equipment

Molecular Biology Research Services

Veterinary Supplies

Library Services

Category Manager **Dave Yates**	Email - david.yates@nwupc.ac.uk Tel - 0161 234 8002

Framework Agreements:

Books, e-books, e-textbooks, and associated services

Books, E-books, Standing Orders and Related Material - Inter-regional Agreement

Office, Computer & Library Supplies

Library Resources

Serials & Periodicals

Library Security & Self Service

Library Management Systems

Office Solutions

Category Manager **Dave Yates**	Email - david.yates@nwupc.ac.uk Tel - 0161 234 8002

Framework Agreements:

Art & Craft Materials

Drinking Water

Franking Machines

Office, Computer & Library Supplies

MFD & Digital Transformation Solutions

Paper – Print and Specialist

Print Solutions

Promotional Merchandise

Professional Services

Category Manager **Sarah Dye**	Email - sarah.dye@nwupc.ac.uk Tel - 0161 234 8016

Framework Agreements:

Catering Consultancy

Ceremonial Gown and Photography Services

Debt Recovery Services

Education Recruitment Advertising & Resourcing Services – National (NERARS)

Employee Benefits

Employee Screening Services

E-Procurement Systems

Executive and Senior Strategic Search and Recruitment Services

Financial Services

Global Workforce Mobility Services

Intellectual Property Services

Legal Services

Occupational Health Services

Online Streaming Services

Recruitment Services

Similarity Detection Systems

Student Information Management System(s) and Associated

Student Module Evaluation Systems and Associated Services

Temporary and Permanent (TAP) Recruitment Services

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Telecommunications

Category Manager **Paula Lister**	Email – paula.lister@nwupc.ac.uk Tel - 0161 234 8006

Framework Agreements:

CCS Network Services
Data Centre Management
HE Networking (HENSS)
IT Related Accessories & Parts (ITRAP)
Mobile Phones Ethically Sourced
Network Equipment (Jisc)
Shared Datacentre (Jisc/Janet)
Telephony Purchasing Services
Telecommunications
Text Short Message Service (SMS) Jisc

Travel

Category Manager **Dave Yates**	Email - david.yates@nwupc.ac.uk Tel - 0161 234 8002

Framework Agreements:

Travel Management Services

Vehicle Hire, Car Club & Leasing

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The NWUPC Team

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North Western Universities Purchasing Consortium
Delivering value through responsible procurement

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