

# First Steps in Procurement

Briefing Pack 2017



# First Steps in Procurement Briefing Pack

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# 1. First Steps in Procurement

This course has been specifically designed by the Training team for the University. It is aligned with the old level 2 course that was offered by the Chartered Institute of Procurement & Supply (CIPS) and is structured to cover the same introductory concepts and techniques.

The course will be beneficial for any staff involved in the purchasing or control of stock. Good control of stock is recognised as a key objective within all organisations, it saves time and money. This course will introduce the techniques necessary to streamline ordering, supplier sourcing and management of the physical stock.

It is suited to those from a number of backgrounds:

- Mature, experienced, staff whose role has been expanded to include purchasing responsibilities.
- Facilities staff with no formalised purchasing training.
- School leavers working in an administrative role within a purchasing department.
- People working in purchasing administration but who have never received formal training.
- People who have undergone training in the past but have never had it formally recognised
- PAs responsible for everything from purchase of travel and catering, to office stationery and equipment.

This is a stand-alone programme however, it could also be a stepping stone to a level 3 qualification with CIPS.

The First Steps into Procurement package gives:

- Understanding of the key terminology and processes used in procurement
- Opportunity to relate the theory to own workplace environment
- Content will consist of general theory and University specific practices
- All materials will be provided
- An introduction to study techniques and preparation for further study if appropriate

## 2. Why a bespoke course?

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CIPS have changed their level 2 syllabus and have extended the academic content. After consultation with departments across the University it is felt that this is not appropriate for the majority of the staff involved with procurement in the University environment. In order to better address the needs of the University it has been decided to produce a bespoke course.

This programme has taken these key elements from the old Level 2 CIPS programme and packaged it specifically for the University. It will offer participants the opportunity to develop their procurement knowledge but to also apply it to their own work environment.

We are running the programme in-house with our qualified and experienced tutors.

Classes will be held at Greenwich House, Madingley Road and will be run specifically for staff of Cambridge University and associated bodies.

Progression opportunities to the Level 3 CIPS course will be discussed during the programme and completion of this course will be one of the prerequisites for acceptance onto any further study courses. The University does not run CIPS courses in-house but assistance could be given to find appropriate study solutions for those who wish to further their studies.

### 3. Course details

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#### The Programme

This briefing pack describes the First Steps in Procurement programme. Once completed, you will have developed an understanding of terminology, concepts and processes involved with procurement.

The topics covered include:

- Roles in procurement
- Five rights of procurement
- Stages of the sourcing process
- The supply chain
- Organisation types
- Impact of market conditions
- Contract types
- Dispensation
- Stock control
- Stakeholders

Throughout the programme, participants will be introduced to the theoretical concepts but will be encouraged to relate these to their own work environment within the University through the class discussions and homework exercises.

There will be marked assignments throughout the course and a final examined assessment at the end of the course.

The Finance Training team believes that success is more assured for staff who attend regular classes and so the course will be primarily based around face to face classroom sessions.

The team of tutors will provide tuition, support and help with preparing for the assignments.

All relevant study material will be provided, including a textbook. There will be additional material, support and practice exercises available via Moodle. Homework assignments will be set and submitted via the Moodle site.

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## Eligibility

The programme is centrally funded through the Finance Division and is open to members of staff in a University procurement role. You may also apply if you work in one of the University colleges, the University Press or Cambridge Assessment, although funding will be requested from your employer who may have their own criteria for joining the programme.

To be eligible for a place on the programme, you will need to meet the following criteria:

- Be a permanent member of staff in the University
- Be supported by your line manager; firstly to confirm that your studies are appropriate and beneficial to you and your department and secondly, to release you to attend all the sessions.
- Be willing to make the personal commitment to complete the programme and enter the relevant examinations; success typically requires 2-4 hours per week of study in addition to the taught study sessions.
- You must agree to the terms and conditions in the application form.
- Each application will be reviewed by the training team before a place on the course is confirmed.

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## Fees

First Steps in Procurement	A total of 5 days (plus the final examined assessment) on the following dates:  <b>14 December 2017</b> <b>21 December 2017</b> <b>11 January 2018</b> <b>25 January 2018</b> <b>01 February 2018</b>  Final assessment date:  <b>22 February 2018</b>	Total course cost £50  <i>Includes:</i> <i>Classroom tuition, assessment marking, comprehensive study materials, access to on-line content</i>
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### Notes:

- If the number of applications from departmental staff exceeds the class capacity, spaces will be prioritised by assessing the relevance of the study to the applicant's role.
- Staff working in a college, or other related University body should agree funding with their institution before applying.
- The total fee of £50 will be invoiced at the beginning of the course to either the individual or their Department/Institution

## 4. Timetable and learning resources

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This programme will take approximately three months to complete.

The course has been scheduled to allow time between each session for participants to complete the homework assignments which will require some element of workplace evidence.

Day Release	
<b>Thurs 14 Dec 2017</b>	Introduction to procurement and supply principles
<b>Thurs 21 Dec 2017</b>	Market Implications
<b>Thurs 11 Jan 2018</b>	Stock control
<b>Thurs 25 Jan 2018</b>	Contracts and processes
<b>Thurs 01 Feb 2018</b>	Stakeholders and ethical procurement
<b>Thurs 22 Feb 2018</b>	Final examined assessment – Half day (timings to be confirmed)

*Classes will be held from 9:30 to 16:30 at:*

*Finance Division  
Greenwich House  
Madingley Rise  
Madingley Road  
Cambridge  
CB3 0TX*

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### The First Steps in Procurement programme study pack

Students will be supplied with study material and access to on-line course content.

It is not necessary for students to purchase additional textbooks to supplement the package.

The materials and homework are managed via an online learning platform and it will therefore be necessary for participants to have access to a computer outside of the classes. The computer will need internet access and a word processing package. If this will be a problem please contact the training team who will help to locate a computer that could be used at work.



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## Classes

All sessions will be held at Greenwich House, Madingley Rise, Madingley Road Cambridge CB3 0TX and will cover the entire syllabus, teaching you topic by topic.

Tutors will prepare participants for the homework assignments and provide guidance and support prior to the final assessment.

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## Study time required

The number of hours per week that each student will dedicate to the study programme will vary; there is no prescribed amount but approximately 2-4 hours per week is the minimum requirement to master the modules and adequately complete the assignments.

The total study period including assignments is about three months.

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## Practical arrangements

If you have any special requirements for the course delivery please contact Helen Parker by phone or email to discuss so we can ensure that your needs are catered for.

The teaching room and related facilities are all wheelchair accessible. Parking can be arranged for those with mobility issues. We have portable hearing induction loops if required and arrangements can also be made to provide materials in alternative formats.

Please speak to Helen Parker by email [helen.parker@admin.cam.ac.uk](mailto:helen.parker@admin.cam.ac.uk) or telephone on (7)66627 to discuss your individual requirements both before the programme starts and at any point if your circumstances change.

Please note that your requirements will not prevent you from joining the programme.

Café facilities are available at Greenwich House and it is a short walk to other facilities on the West Cambridge site. You are of course welcome to bring your own lunch with you which you may eat in the café. There is a fridge available if you need to keep anything cool and microwaves are available to use in the café.

See Appendix 1 for detailed directions

## 5. The Assessments

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### Course Assignments



There will be five assignments during the course.

Each assignment will relate to the topics covered in the classroom session that week.

The assignments will require the participant to apply the theories and concepts discussed during the session to their own work environment and experiences.

Participants **do not** need to be employed exclusively in a procurement role in order to complete the course. It is helpful if they have some involvement in ordering and managing some supplies.

The assignment tasks are available on Moodle immediately after the session. The completed assignment should be uploaded to the online Moodle site by the deadline given (full instructions will be given for this).

The tutor will mark and provide feedback on all of the assignments. These mid-course assessments are developmental and enable the tutor to provide individual support where necessary. The marks are recorded but do not form part of the final course mark. Feedback on progress will be shared with line managers throughout the course.

### End of course exam

Greenwich House in Cambridge will be the venue for sitting the final examined assessment. The online assessment will be 2 ½ hours and consist of multiple choice and short answer, scenario based, questions. The content assessed will be taken from the whole course.

Participants will be supported in their preparation for this assessment and practice material will be available prior to the assessment, the pass mark is 70%.

If a participant is un-successful, a feedback report will be provided and support provided in preparation for a re-sit.

## 6. Administration

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### **Progress**

Individuals are encouraged to consult with the tutors within Finance Training whenever they feel it to be beneficial to their progress. We will liaise with you periodically by phone/email to confirm progress throughout the programme.

### **Assessment Results**

One of the conditions of acceptance is that students complete the programme and sit the final assessment. Progress and results will be shared with their line managers

### **Absence from workshops**

Please notify Helen Parker or Margaret Peck in Finance Training as soon as possible if you have any planned or unplanned absence from a class session using the contact number below:

*Helen Parker - (7) 66627*

*Margaret Peck -(7) 66631*

### **Quality Assurance**

As part of our Quality Assurance we will contact you periodically for feedback about the tuition etc.

If however you have any concerns please do not hesitate to contact the Manager of Finance Training to share your concerns.

## 7. Contacts and further information

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Contact Helen Parker about any aspect of the First Steps into Procurement programme

Helen Parker [helen.parker@admin.cam.ac.uk](mailto:helen.parker@admin.cam.ac.uk)

Tel: 01223 (7)66627

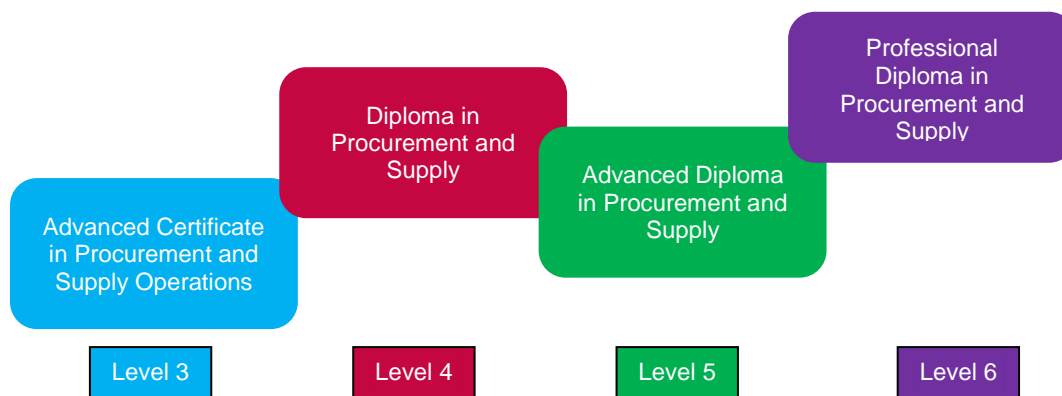
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### Further progression

CIPS is the premier global organisation serving the procurement and supply profession. Dedicated to promoting best practice, CIPS provides a wide range of services for the benefit of members and the wider business community.



The CIPS qualifications are taught in levels, full accredited membership of CIPS is awarded on completion of the Professional Diploma in Procurement and Supply (Level 6)



Participants on the first steps programme should gain level of understanding and this programme will provide a good basis from which to start studying for the formal CIPS qualifications at level 3 (Advanced Certificate in Procurement and Supply Operations).

Plans for further CIPS study are being discussed, if this is something that you would like to pursue you are welcome to discuss your options further with Helen Parker of the Finance Training Team by calling on (7)66627 or by email on [helen.parker@admin.cam.ac.uk](mailto:helen.parker@admin.cam.ac.uk)

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### Further information about CIPS

If you would like to find out more about CIPS. <https://www.cips.org/>

To see more detail on the CIPS study programmes. <https://www.cips.org/en-gb/qualifications/about-cips-qualifications/>

## 8. Applying for the First Steps in Procurement programme

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- Register interest on UTBS  
<https://www.training.cam.ac.uk/fin/event/2081623>
- Complete the application form
- Discuss with your line manager and ask them to complete section 5 of the Application form.
- Agree with your line manager who will pay the course contribution of £50 and indicate as appropriate on section 7 of the form.

- Return a completed Application form by **Wednesday 23 November 2017** to:

Margaret Peck  
Finance Training  
Finance Division, Greenwich House  
Madingley Rise, Madingley Road  
Cambridge  
CB3 0TX

## Appendix 1: Directions to Greenwich House

### Travelling to Greenwich House

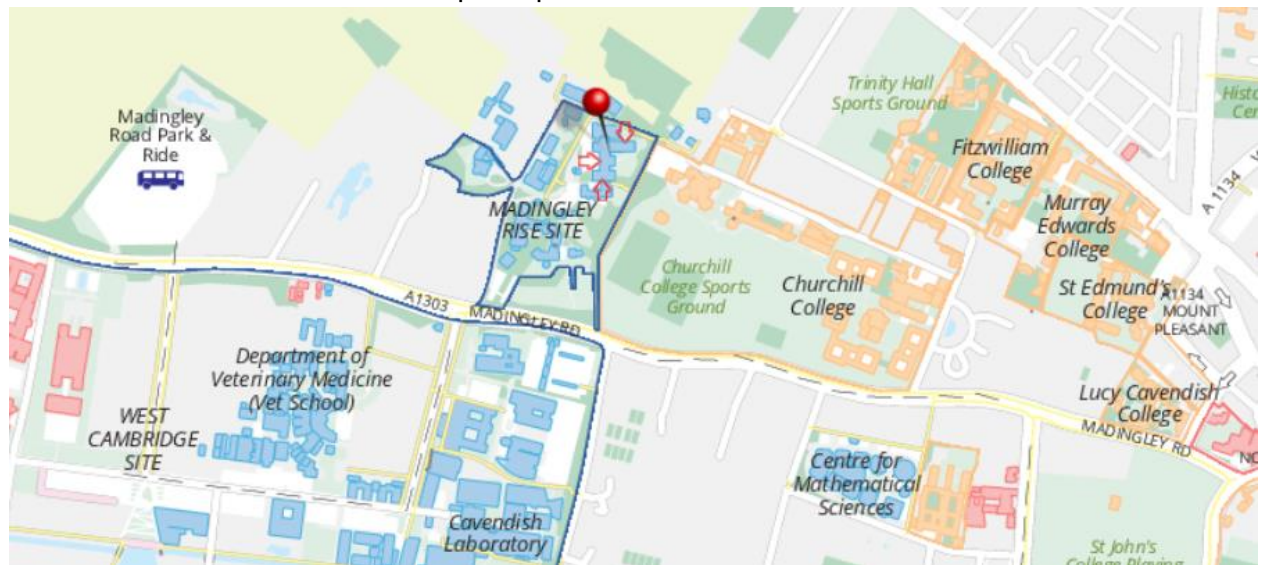
Finance Training, Greenwich House, Madingley Rise, Madingley Road  
Cambridge CB3 0TX

Tel: 01223 766627

Fax: 01223 765094

Email: [helen.parker@admin.cam.ac.uk](mailto:helen.parker@admin.cam.ac.uk)

Please use the Universal Bus or cycle to Greenwich House as parking is severely limited and will not be available to course participants.



## Arriving by train

There are fast trains from London King's Cross Station to Cambridge every half hour, taking about 50 minutes. Direct trains are available to Cambridge from Norwich, Ipswich, Birmingham and also from Stansted airport. Full timetable details are available from [Network Rail](#).

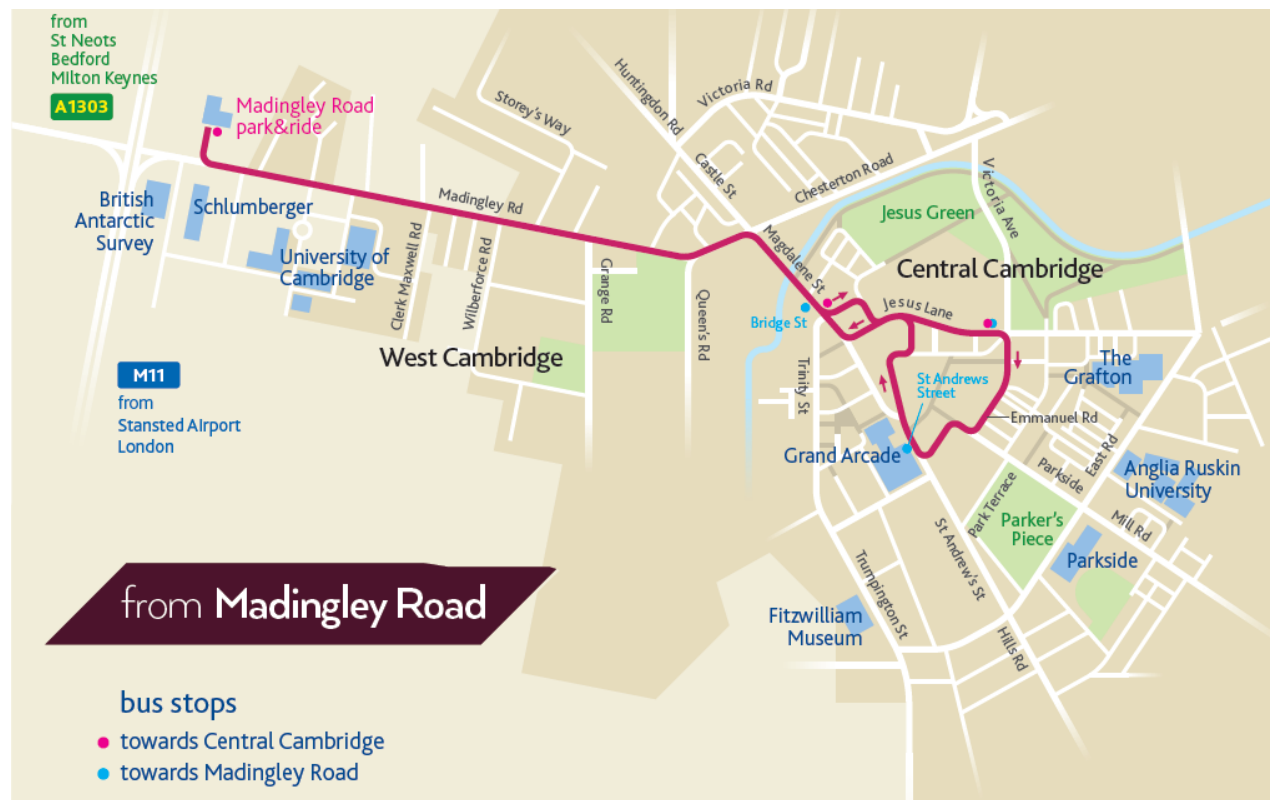
Taxis to Greenwich House are available from the station. If you wish to travel from the station by bus, the Citi 1 service to St Andrew's Street (bus terminates at Arbury) followed by the Park and Ride Bus (see below) is the best option.

## Arriving by bus

The Universal bus runs from Addenbrooke's and Trumpington Street every 20 minutes and costs £1 per single journey for Cambridge University cardholders. Get off the bus as it turns onto J. J. Thomson Avenue, walk back towards Madingley Road and follow the directions below.

The Citi 4 bus also serves the West Cambridge site (weekdays until 8pm only). A full fare is payable on the Citi 4 route, and this service terminates in Downing Street in the city centre and does not go out to Addenbrookes.

Alternatively the Pink [Park & Ride Bus](#) departs from the city centre (St. Andrew's Street) every 10 minutes and stops close to Greenwich House, taking approximately 15 minutes to get here.



If travelling from the centre, ensure you catch the bus to Madingley Road Park & Ride.

- As you come up the Madingley Road from centre of town, get off the bus just after J. J. Thomson Avenue - the entrance road on your left hand side for the Computer Labs (the William Gates Building) and the Cavendish Labs. Other bus routes that use the same stop on Madingley Road are the 130/X30.

- Walk back towards this entrance road. You will see a crossing island in the middle of Madingley Road - cross at this point.
- Virtually opposite you, there will be an entrance road (this is Madingley Rise)
- Look for the blue sign on the right hand side for the Finance Division. Follow this road round and to the right.
- Continue past the right turn, which says Visitor Parking. On your right, just past here, there is a footpath that runs alongside the hedge. Take this and follow it around to the left to get to Greenwich House.

Further information on local buses is available on the [Stagecoach Website](#).

### **Arriving by bicycle**

- Turn into Madingley Rise from Madingley Road
- Go past the Visitors carpark
- On your right there is a footpath running alongside the visitor parking area. Take this footpath and follow it around to the left.
- Just after the bend, there is a bicycle shed for visitors on your left. Please leave your bicycle here. Greenwich House is at the end of the footpath.

There is a drying room available for wet coats if necessary

### **Lunchtimes and refreshments**

There is a café on site, which serves sandwiches, jacket potatoes, soup etc. at lunchtimes. There are also microwaves available if you wish to heat up your own food. You are welcome to eat your own food in the bistro. A fridge is provided for Finance Training delegates to store food during the day. In addition, the food outlets on the West Cambridge site are accessible within 10-15 minute walk.

### **Accessibility**

The teaching room and related facilities are all wheelchair accessible. Parking can be arranged for those with mobility issues. We have hearing induction loops in both main teaching rooms and a portable system, which can be used in any other rooms used during the course. Arrangements can be made to provide materials in alternative formats.

Please speak to Helen Parker by email [helen.parker@admin.cam.ac.uk](mailto:helen.parker@admin.cam.ac.uk) or telephone on (7)66627 to discuss your individual requirements both before the programme starts and at any point if your circumstances change.  
Please note that your requirements will not prevent you from joining the programme



# Application for First Steps into Procurement course 2017



Please return the completed form by 23 November 2017 to:

**Margaret Peck, Finance Training, Greenwich House, Madingley Rise, Madingley Road, Cambridge.**

The Finance Team will contact you and your line manager to discuss your application, the study requirements and the commitment of all parties to the proposed study.

Finance Training will formally notify the candidate and their manager of acceptance onto the programme. Each application will be considered on a case by case basis.

## 1. Applicant

Title ..... First Name ..... Last Name .....

Department/College/Institution name .....

Work telephone number .....

Work email .....

Job title .....

Brief description of your current role .....

Time in current post .....

## 2. Details of training to be undertaken

Course title: **First Steps in Procurement**

Training provider/venue: **Finance Training, Greenwich House**

Type of attendance and duration: **Day Release**

Total cost of study package and exam fees: **Day Release £50**

Have you undertaken any other purchasing study programmes or courses before? .....

If yes, please describe what and when .....

**3. Personal statement by applicant.**

Please state why you want to undertake the training, what skills and knowledge you hope to develop and how these can be used in your current role.

**4. Agreement by the applicant**

Please read carefully all the information in this section before signing below.

- The training must be directly relevant to the applicant’s current role.
- There must be departmental support for the training.
- Acceptance is approved only for the course specified in Section 2 above; the applicant must reapply for funding for any subsequent course/qualification.
- To qualify for this course, the applicant must agree:
  - (a) to attend all necessary sessions and to report any absences to his/her department
  - (b) that Finance Training will provide information to the Department/Institution on his/her attendance and progress – and a summary of progress will be provided to the department signatory named in section 5 below
  - (c) to take part in an evaluation process of the training package and complete feedback about the quality of training provision
  - (d) to contact Finance Training as early as possible to discuss any concerns about the course or his/her progress

I accept the conditions set out above.

<p>Applicant Signature .....</p> <p>Date.....</p>
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**Sections 5 and 6 are to be completed by the Head of the Department/Faculty or Staff Development Coordinator.**

**5. *Supporting statement, please include how this training will benefit the applicant and the Department/University***

**6. *Agreement by the Department or Faculty***

I agree to release the applicant as necessary in order for him/her to attend the course and will monitor their attendance and progress. Additionally, I agree to notify Finance Training immediately if the applicant submits their resignation or transfers to another institution during the course.

Signed.....
Position.....
<b>Print</b>
Name.....
Email.....
Date.....

**7. *Authorisation to invoice for course contribution***

Pease indicate below who has agreed to pick up the course cost of £50 and should be invoiced accordingly.

<p><b>The Applicant</b></p> <p>Signature.....</p> <p>Name..... Date.....</p> <p>OR</p> <p><b>The Department</b></p> <p>Signature.....</p> <p>Name..... Date .....</p>
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