

**GUIDE ON
HOW TO DO BUSINESS
WITH
LIVERPOOL JOHN MOORES
UNIVERSITY**

PRODUCED BY – LIVERPOOL JOHN MOORES UNIVERSITY PROCUREMENT SERVICES

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ABOUT THIS GUIDE

The purpose of this guide is to assist suppliers who wish to provide goods, services or works to the University

The guide explains the following:

- A background to the University and the role of Procurement Services
- Procurement rules and regulations that the University must adhere to when procuring goods , services and works
- Carbon Reduction is a priority for LJMU
- How suppliers can be alerted to the opportunities to supply the University
- Advice for suppliers when completing tenders

The University encourages applications from all types of supplier e.g. local, national, small medium enterprise (SME), limited companies, ethnic minority owned businesses etc.

The guide is for advice and guidance purposes only. As there is a high demand for University business, suppliers must appreciate that this guide will not guarantee them the success of being awarded a contract.

LJMU Together – making a difference

Our city and our university stand tall together. We have grown from the confident, ambitious origins of Liverpool and have a shared history built on working hard, caring about supporting people and communities and being proud of who we are.

We have a distinct place in this lively city with our warm, friendly and open people. We share a spirit of adventure with a community striving to make a difference and put something back.

Our staff, students and alumni are the beating heart of this university, with an impact that goes beyond academic, economic and social measures. It can be seen in our physical footprint around the city, our global connections and how often you will meet someone who has been transformed by a connection with our university and has helped transform the lives of others.

Making a difference is what a university should be about. It is what we are about. It is who we are. It is Liverpool John Moores University.

We are an ambitious and forward thinking institution that challenges convention and believes passionately in the concept of 'One University' – a community working together to achieve common student-centered objectives within a clear strategy.

www.ljmu.ac.uk

The Procurement Function at Liverpool John Moores University

Definition of Procurement - Procurement is the acquisition of appropriate goods and/or services at the best possible total cost of ownership to meet the needs of the purchaser in terms of quality and quantity, time, and location. The acquisition comes in the form of purchasing, contracting, and negotiating directly with the source of supply through means of quotation exercises or competitive tenders.

Procurement Services at LJMU have responsibility for developing and supporting the following areas:-

- LJMU Procurement Strategy
- Financial Regulations
- LJMU Contract List
- E Procurement (Proactis Parabilis)
- LJMU Corporate Contract Programme (Annual Work Plan)
- Liaison with external purchasing Consortia / National Groups
- Sustainable / Ethical acquisition and disposal of goods
- Modern Slavery Act and annual statement
- Responsible Procurement
- E-tendering (In-tend)
- Supporting LJMU Faculties and Service Teams to achieve value for money and best practice in obtaining goods and services

Procurement Services supports the University's aims and objectives, helping deliver high quality services which meet the current and future needs of staff, students and the local community and are based on VFM (value for money / whole life costings). The University must also adhere to Public Procurement Regulations (see page 7).

Liverpool John Moores University is keen to work with suppliers who focus on environmental and social factors and who are willing to work with the University to make improvements in these areas. <https://www.ljmu.ac.uk/about-us/about-liverpool-john-moores-university/ljmu-climate-action>

Purchasing Consortia

The University uses a number of contracts let by purchasing consortiums and whilst their structure and specialties may differ, they all deliver greater value for money and reducing the level of administration on organisations. The main consortiums used by the University are as follows:

North West Universities Purchasing Consortium (NWUPC) and associated HE consortia

LJMU acquire the majority of commodity based items from the consortia, such as stationery, furniture, catering etc. Further information is available from:

<http://www.nwupc.ac.uk/>

The Crown Commercial Service (CCS)

The Crown Commercial Service are the national procurement partner for UK public services. The primary role of CCS is to maximise value for money obtained by Government Departments and other public bodies through the procurement and supply of goods and services. Further information is available from

<https://ccs.cabinetoffice.gov.uk/>

Pagabo

LJMU access Pagabo for Estates related requirements

<https://www.pagabo.co.uk/>

Procurement Rules and Regulations

The Procurement Services role at LJMU is to ensure the University follows its commercial dealings in a professional manner that delivers:

- quality goods, services, works for the best possible price
- ensuring risk is eradicated or reduced wherever possible.

To achieve this role the University has policies and procedures which ensure that the correct process is adopted to meet our needs:

- depending on the cost of the requirement
- where it will be sourced from
- whether an existing contract can be utilised.

The table below shows the procurement route for non-contacted requirements:

| Value | Procedure |
|-------------------------------|--|
| £1,000 - £9,999 | Minimum of one written quotation |
| £10,000 - £50,000 | Minimum of three written quotations |
| £50,000 and over | Subject to competitive tender via Procurement Services (if framework not accessed) |
| £214,477 and over | Subject to public procurement regulations tender via Procurement Services |
| £5,336,937 and over for works | Subject to public procurement regulations tender via Procurement Services |
| £615,278 and over | Light Touch Regime - Services |

Procurement Processes

Request for Quotation

Where staff members have a requirement but there isn't a contract or framework in place to cater for their needs, then a written quotation may be obtained using the above table for guidance. Where a framework is in place, a mini-competition must be followed, ensuring all relevant suppliers are included.

Invitation to Tender

All requirements over £50,000 should follow a tender process, or have an Exception to Financial Regulations form approved by Finance.



The tender documentation requests in depth information on all aspects of commercial and non-commercial information, this also includes the specification and pricing matrix.

EU Tender Process

All requirements with a projected expenditure of over the Public Procurement Regulations thresholds currently at £214,477 for Goods and Services, and £5,336,937 for Works are advertised through the UK Find a Tender portal. The thresholds are reviewed every two years, with the next review scheduled for 1st January 2024.

LJMU follow two main procedures, Restricted and Open, and the University takes a decision on the appropriate route to follow depending on the requirement.

Where a requirement has a large number of prospective suppliers in the marketplace the Restricted Procedure is followed, which is a two-stage process. The first stage issues all suppliers who have expressed an interest are sent a Selection Questionnaire (SQ), which asks for commercial and non-commercial information. The SQ may also include questions on any supplementary information required for a particular requirement.

Following evaluation of the SQ, those that have not qualified for the second stage are notified, and those that have been shortlisted are issued with tender documentation (Stage two). The tender documentation includes the specification and pricing matrix.

The Open procedure is a single stage process and involves the issuing of tenders to all suppliers who express an interest. Within the Open Procedure all commercial, non-commercial, adherence to the specification and price are all assessed as part of the process.

Research Awards / Grants

For all goods and services expenditure incurred in research awards/grants, LJMU Departments should ensure that each award funder's general and grant specific terms and conditions for the procurement process are met. Please note that these requirements will sometimes go beyond the University's standard requirements, and therefore a tender opportunity of £25,000 and over may be (depending on the awarding body) advertised on Contracts Finder – follow this link to register <https://online.contractsfinder.businesslink.gov.uk>

Tender Documentation

The University's tender documentation is a means of assessing a supplier's capability to provide goods/services/works. The documentation has various sections that must be completed by the supplier when bidding for a University Contract. The documentation includes but is not limited to the following categories:

| Commercial | Non Commercial | Appropriateness of Solution |
|-----------------------|---|------------------------------------|
| Form of Tender | Health and Safety | Technical Capability |
| Financial Information | Waste Electrical and Electronic Equipment (WEEE) | Supplementary Information |
| Insurance | Restriction of the use of certain hazardous substances (ROHS) | Price |
| Quality Assurance | Environmental | Modern Slavery Act 2015 |
| References | ESG – Environmental, Social Governance | Supply Chain Conduct |

As part of the tender evaluation each section is weighted depending on the importance to the contract. The evaluation weightings are detailed in the tender documentation; this enables suppliers to see how important each of the criteria is to the University.

For suppliers to be successful, as much information as possible must be provided along with any evidence requested. The submitted bid must also follow the format as stipulated in the tender document.

When a supplier does not complete a section, or attach the relevant evidence required this means no marks can be achieved under that heading. Therefore is

then at a disadvantage as to the maximum marks they can achieve compared to a supplier who has comprehensively and methodically completed the documentation.

Tips for completion

The following is an explanation on each section of the tender document, and what is required from a supplier applying for University Business

Form of Tender

This section requires the bidding suppliers to review and agree to the University's terms and conditions relevant to the contract. Suppliers are asked to provide mandatory information relating to their past business practices and sign a declaration that this is accurate and no third party collusion has taken place.

Failure to sign and complete this section will result in disqualification

Financial Information

Potential Suppliers will be asked to provide financial information relating to their last two x years' worth of trading. This information will be used to assess the financial position of a company. In high-risk contracts where non-performance could result in significant financial loss or where operational performance is crucial, suppliers may be asked to submit a Parent Company Guarantee or Performance Bond.

Suppliers sometimes fail to provide the financial information in the requested format; this is mainly due to two reasons:

- 1) The University requires the financial information in Great British Pounds (GBP) sterling, but suppliers choose to submit in an alternative currency.
- 2) A supplier chooses to send a copy of their full accounts as opposed to completing the University's documentation.

Please note, alternative currencies and / or copies of full accounts will not be accepted and result in the supplier scoring zero for this section.

Insurance Details

The University needs to be assured that they trade with suppliers who have the correct insurance policies and levels of indemnities in place. Suppliers are requested to provide evidence of their insurance policies and confirm that sub-contractors have the correct level of insurance. The levels and types of insurance may vary depending on the University's requirement, and will be detailed in the tender documentation.

Quality Assurance

For certain contracts including works, suppliers may be required to demonstrate they have suitable quality assurance and accreditations in place. Suppliers will be asked to provide evidence of the certification they have

References

Suppliers will be asked to provide details of up to three reference sites, which the University may decide to take in respect to the services/goods/works that you are bidding for. Some further questions will be asked and these are normally tailored to the needs of the contract. The responses will be used to assess whether a company has the required level of skills and abilities to be able to supply the University. When providing reference sites, try to provide details of clients who are similar in profile to the University.

Health and Safety

The University needs to ensure that the suppliers they use comply with Health and Safety legislation. Depending on the contract, suppliers may need to answer additional questions relating to working on University premises

equipment being produced and to encourage reuse and recycling

Restriction of the Use of Certain Hazardous Substances in Electrical and Electronic Equipment Regulations 2021(ROHS)

The University require that all electrical and electronic goods purchased from supplier, whether you are a manufacturer or a retailer of, are checked for hazardous substances.

ESG – Environmental Social Governance

The University declared a Climate Change Emergency in 2020, as reducing our carbon emissions is of paramount importance to us

<https://www.ljmu.ac.uk/about-us/about-liverpool-john-moores-university/ljmu-climate-action>

The questionnaire welcomes details of your philanthropy and charitable contributions to inform us of your contribution to Social Value.

The University wishes to place business only with suppliers who treat people equally. A supplier is required to adhere to the Commission for Racial Equality's code of practice for Employment or relevant standard within your working processes and ensure they are covered in all relevant company documentation and have a Diversity and Equality policy or an Equal Opportunities Policy.

Appropriateness of Solution / Supplementary Information

A specification will be provided for suppliers to review. Depending upon the nature of the contract the University will either be simply looking for confirmation that you can meet the University's requirements or may require a detailed proposal of how the supplier intends to comply with specification. Depending on the nature of the contract, suppliers may be asked to provide samples of their products / and or attend an interview to clarify their proposal.

Receipt of Tenders

The tender response will have a closing date and time, if a supplier submits a tender late then this will be rejected and will not be evaluated by the University. Therefore it is imperative the tender response is delivered on time and to the correct address as detailed within the tender document.

Terms and Conditions (Contract)

The tender documents will include the applicable terms and conditions.

Contract Award (Intention to Award)

Tenders are evaluated using pre-determined weighted criteria. The criteria will cover the above-mentioned sections of the tender documents as well as cost / price. The full criteria will be detailed in the tender documentation

All suppliers are notified as to whether they have been successful or unsuccessful, providing details of winning scores, average scores, and a breakdown of your personal submission score. Only the winning score and average score is divulged to all bidders. Feedback as to how your bid compared to the winning bidder is also provided. LJMU do not offer face to face, or telephone debriefs, as all the information pertaining to the tender exercise is included in the Intention to Award letter.

Tender Submissions

All tenders should be submitted to the LJMU E-Tendering Portal – please register on this link:

<https://in-tendhost.co.uk/ljmu>

Email or postal submissions will be rejected

Liverpool John Moores University

Finance

Procurement Services

2nd Floor Exchange Station

Tithebarn Street

Liverpool

L2 2QP

Email: Purchaseorderqueries@ljmu.ac.uk (for general enquiries only)

Any emails regarding a live tender exercise must be submitted via the Intend – E-Tendering portal – correspondence function