Invitation to Quote

Invitation to Quote (ITQ) on behalf of Higher Education Funding Council for England

Subject UK SBS Learning Gain

Sourcing reference number **BLOJEU-CR16006HEFCE**

UK Shared Business Services Ltd (UK SBS) www.uksbs.co.uk

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Section 1 – About UK Shared Business Services

Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our customers improve efficiency, generate savings and modernise.

It is our vision to become the leading provider for our customers of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our customers. This allows our customers the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by its customers, UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business Innovation and Skills (BIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Customers.

Our Procurement ambition

Our vision is to be recognised as a centre of excellence and deliver a broad range of procurement services across the public sector; to maintain and grow a procurement service unrivalled in public sector.

Procurement is a market-shaping function. Industry derived benchmarks indicate that UK SBS is already performing at or above "best in class" in at least three key measures (percentage savings, compliant spend, spend under management) and compare well against most other measures.

Over the next five years, it is the function's ambition to lead a cultural change in procurement in the public sector. The natural extension of category management is to bring about a fundamental change in the attitude to supplier relationship management. Our philosophy sees the supplier as an asset to the business and the route to maximising value from supply. This is not a new concept in procurement generally, but it is not a philosophy which is widely employed in the public sector.

We are ideally positioned to "lead the charge" in the government's initiative to reform procurement in the public sector.

UK SBS Procurement's unique selling points are:

- Focus on the full procurement cycle
- Leaders in category management in common and specialised areas
- Expertise in the delivery of major commercial projects
- That we are leaders in procurement to support research
- Use of cutting edge technologies which are superior to those used generally used across the public sector.
- Use of market leading analytical tools to provide comprehensive Business Intelligence
- Active customer and supplier management

'UK SBS' contribution to the Government Procurement Agenda has been impressive. Through innovation and leadership UK SBS has built an attractive portfolio of procurement services from P2P to Strategy Category Management.'

John Collington

Former Government Chief Procurement Officer

Section 2 – About Our Customer

Higher Education Funding Council for England

HEFCE distributes public money to higher education institutions in England and ensures that this money is used to deliver the greatest benefits to students and the wider public.

In 2014-15 HEFCE directly funded 130 universities and higher education colleges and 212 further education colleges. The funding is used to support institutions' teaching, research, knowledge exchange and related activities. This includes research and activity to ensure that everyone with the potential to benefit from higher education has the chance to do so.

To ensure that this money is being used appropriately, HEFCE:

- monitors the institutions' financial and managerial health
- ensures that the quality of teaching is assessed
- organises the assessment of research quality with the other UK funding bodies.

2013 Survey of Higher Education Institutions and other Stakeholders

An independent survey has shown further improvements in our communication and relations with stakeholders.

The survey, carried out by Pye Tait Consulting between July and October 2013, found that HEFCE is considered by its stakeholders to be highly respected, trusted and approachable. Eighty per cent are satisfied with their relationship with HEFCE – an overall improvement since previous surveys were undertaken in 2009 and 2007.

HEFCE is using the survey results to further improve its relations, operations and services.

Further information can be found at: http://www.hefce.ac.uk/

Section 3 - Working with UK Shared Business Services Ltd.

Section	Section 3 – Contact details		
3.1	Customer Name and address	Ross Hudson Higher Education Funding Council for England Nicholson House Lime Kiln Close Stoke Gifford BRISTOL BS34 8SR	
3.2	Buyer name	Victoria Clewer	
3.3	Buyer contact details	research@uksbs.co.uk	
3.4	Estimated value of the Opportunity	Up to £50,000 plus VAT	
3.5	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available <u>here</u> . Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.	

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section	Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	19/05/2016	
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	30/05/2016 14:00	
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	03/06/2016 14:00	
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	09/06/2016 14.00	
3.10	Anticipated rejection of unsuccessful Bids date	23/06/2016	
3.11	Anticipated Award date	23/06/2016	
3.12	Anticipated Contract Start date	24/06/2016	

3.13	Anticipated Contract End date	25/07/2016
3.14	Bid Validity Period	60 Days

Section 4 – Specification

Summary

As part of a wider programme of work that is investigating the assessment of *Learning Gain* in English Higher Education (HE), The Higher Education Funding Council for England (HEFCE) wishes to procure a test that will appropriately measure higher education students' critical thinking and problem solving skills.

This test will be administered as one element within the HEFCE National Mixed Methodology Learning Gain pilot project, which is described below. The first phase of testing with undergraduate students in a group of nine higher education institutions in England, selected to be representative of the sector, will begin in October/November 2016. HEFCE both expects to own the rights to the test that is selected, (including for use in potential future iterations of the study) and any data produced through use of the test.

HEFCE anticipates procuring for a number of elements to support the delivery of the National Mixed Methodology Learning Gain pilot project: this tender (released on the 19/05/2016 and closing on the 06/06/2016) relates solely to the procurement of the critical thinking and problem solving test.

Background

The Council

HEFCE was established in June 1992 under the terms of the Further and Higher Education Act 1992 as a non-departmental public body operating within a policy and funding context set by the Government. HEFCE funds and regulates universities and colleges in England. We invest on behalf of students and the public to promote excellence and innovation in research, teaching and knowledge exchange. The range of activities that this money supports and our current policies in each area can be found on our website: http://www.hefce.ac.uk/.

Learning Gain

Around the world, there is now increasing interest in measuring and providing evidence to measure how students' knowledge, skills and work-readiness change and improve through their experience of higher education. By measuring aspects of a students' knowledge, understanding and skills at the start, during and at the end of their period of HE study, it is hoped that we can gain a better understanding of the distance travelled by the student and a more in-depth understanding of how learning and teaching practices have contributed to this.

While significant research on the measurement of learning gain and its proxies in HE has taken place in other countries such as the USA, there have been comparatively few studies within the UK. As a result, we know relatively little about the validity and feasibility of learning gain measurement methodologies in HE in England.

Current HEFCE activity

HEFCE is currently undertaking a programme of activities to explore approaches to the measurement of learning gain (<u>http://www.hefce.ac.uk/lt/lg/work/</u>).

In 2014, HEFCE, BIS and the HEA commissioned RAND Europe to undertake a critical evaluation of the range of assessment methods and tools for the measurement of learning gain worldwide. In their research report 'Learning gain in higher education', RAND defined five broad categories into which methodologies for measuring learning gain fall: standardised tests, grades, self-reporting surveys, other qualitative methods, mixed methodology. The report is available to download at: www.hefce.ac.uk/lt/lg/research/

Building on this initial evidence, HEFCE is now working with the sector to develop better understanding of how to measure learning gain, and which approaches might be suitable and scalable within the English context. This work incorporates a series of interlinked activities, including:

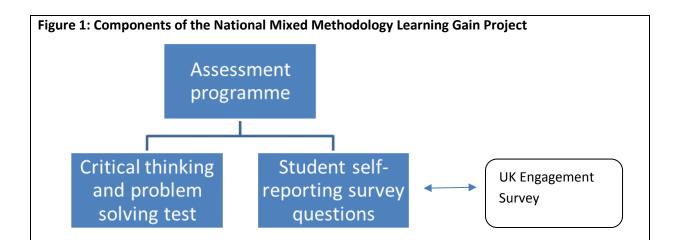
- analysis, to be undertaken by HEFCE, of existing administrative data relating to student characteristics and survey data relating to student's experience of higher education such as the National Student Survey (NSS).
- sector capacity building and networking events
- following a call for expressions of interest released in March 2015, support for 13 collaborative institutional projects to pilot and evaluate a range of approaches for measuring learning gain, with a range of different types of students, involving over 70 universities and colleges in the country

National mixed methodology learning gain project

As part of the wider programme of activity, HEFCE wishes to design and implement the National Mixed Methodology Learning Gain Project. The pilot project will be launched in October/November 2016, and data will be collected at four assessment points across three years of an undergraduate student's studies, as detailed in figure 1, through an electronically administered assessment programme, which will include:

- a test of students' critical thinking and problem solving skills (this is the element this tender covers)
- a series of student self-reporting survey questions focused on understanding issues related to the students' growth and development
- beginning at the second assessment point in May/June 2017, a selection of questions taken from the Higher Education Academy's UK engagement survey (UKES; www.heacademy.ac.uk/research/surveys/united-kingdom-engagement-survey-ukes).

We intend to put in place arrangements for this study to be piloted with nine English HE institutions, with an estimated 27,000 students invited to participate.



Through this tender, HEFCE therefore wishes to procure a non-discipline specific critical thinking and problem solving test, for use within the assessment programme of the HEFCE National Mixed Methodology Learning Gain Project. The test that is procured will be combined with the student self-reporting survey questions, and uploaded to an appropriate electronic survey software package.

To improve validity, we anticipate cognitive testing of these combined questions, to be undertaken by an external contractor, working with a group of students prior to the wider project launch.

The assessment programme will be launched with UK-domiciled, young, full-time, undergraduate, first degree entrant students, on three year programmes (in partnership with the selected institutions, who will be contractual partners), in October / November 2016. The programme will be run again with the same students at three further junctures – at the end of the first academic year (May/June 2017); end of the second academic year (May/June 2018) and end of the third and final academic year (May/June 2019).

Data produced through the four assessment points of the programme will be analysed by HEFCE in order to evaluate how the students have progressed.

Tender aim and scope

As described above, HEFCE therefore wishes to procure a non-discipline specific test, focused on the following elements:

- critical thinking we wish to understand through the test the student's intellectual ability to
 actively analyse, conceptualise, and evaluate information and inferences gathered from or
 generated by observation, reflection or communication to calculate likelihoods and in turn
 make decisions and increase the probability of a desired outcome.¹
- problem solving we wish to understand through the test the student's ability to examine a broad range of information, recognising patterns and selectively narrowing the information in order to resolve a problem. This can also involve creating innovative solutions, integrating information and highlighting possibilities that others may not grasp.

Below we set out further criteria the test should meet.

Conceptual features

The test should:

¹ Examples of definitions of critical thinking include: <u>http://www.criticalthinking.org/pages/defining-</u> <u>critical-thinking/766</u>

- be able to identify and measure a range of students' cognitive ability
- be able to fairly assess all undergraduate students' ability, regardless of their programme and mode of study
- include questions that are appropriate for final year undergraduate students, i.e. questions that are sufficiently stretching and intellectually challenging. We are also interested to see questions where a range of responses are possible, with degrees of 'correctness' and where the answers are not always binary
- robustly and effectively measure critical thinking and problem solving (reflecting our definitions), in a way that is relevant to HE.
- be supported by evidence of effectiveness. This evidence could include successful use of the test in previous higher education studies; evidence of previous evaluations of the test, or previous psychometric analysis of the test.
- not include questions that measure a student's cognitive skills through numerical reasoning.

Technical features

- The test (including answers or scoring criteria) should be pre-developed and tested, and presented to HEFCE without the need for further development. However, HEFCE reserves the right to edit questions if this is deemed necessary through cognitive testing with students
- The test should be in tick box style and multiple choice with most questions having four or five options for the participant to choose from. It should exclude open text responses.
- The test should be able to be run using online survey software.
- The test should take no longer than 30 minutes for a participant to complete in one sitting under normal circumstances. However, in order to maximise response rates, we would like to understand if the test would still be valid if the students were able to complete the test in a number of sittings.

Additional features

• HEFCE both expects to own the rights to the test that is selected, including for use in potential future iterations of the study and any data produced through use of the test.

Section 5 – Evaluation model

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UK SBS, the Customer and any specific external stakeholders UK SBS deem required. After evaluation the scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 (5+5+6 =16÷3 = 5.33)

Pass / fail criteria		
Questionnaire	Q No.	Question subject
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Contract Terms
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Ownership rights
Quality	AW6.3	Test duration and style
Quality	AW6.4	Bid Submission

Scoring criteria

Evaluation Justification Statement

In consideration of this particular requirement UK SBS has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. UK SBS considers these weightings to be in line with existing best practice for a requirement of this type.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	15%
Quality	PROJ1.1	Methodology 1	30%
Quality	PROJ1.2	Methodology 2	15%
Quality	PROJ1.3	Methodology 3	15%
Quality	PROJ1.4	Evidence of prior development and evaluation	25%

Evaluation of criteria

Non-Price elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation: Score/Total Points available multiplied by 20 (60/100 x 20 = 12)

Where an evaluation criterion is worth 10% then the 0-100 score achieved will be multiplied by 10.

Example if a Bidder scores 60 from the available 100 points this will equate to 6% by using the following calculation: Score/Total Points available multiplied by 10 ($60/100 \times 10 = 6$)

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered or the response is completely unacceptable.
10	Extremely poor response - they have completely missed the point of the
	question.
20	Very poor response and not wholly acceptable. Requires major revision to the
	response to make it acceptable. Only partially answers the requirement, with
	major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with
	deficiencies apparent. Some useful evidence provided but response falls well
	short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon.
	Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high
	levels of assurance consistent with a quality provider. The response includes a
	full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting
	the requirement. No significant weaknesses noted. The response is compelling
	in its description of techniques and measurements currently employed, providing
	full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that the final score returned may be different as there may be multiple evaluators and their individual scores will be averaged (mean) to determine your final score. **Example**

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

Your final score will $(60+60+40+40) \div 4 = 50$

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: Score/Total Points multiplied by 50 ($80/100 \times 50 = 40$)

The lowest score possible is 0 even if the price submitted is more than 100% greater than

the lowest price.

Section 6 – Evaluation questionnaire

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on completion of the questionnaire is available at http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

What makes a good bid – some simple do's 🙂

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions.
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission we may reject your Bid.
- 7.5 Do ensure you utilise the Emptoris messaging system to raise any clarifications to our ITQ. You should note that typically we will release the answer to the question to all bidders and where we suspect the question contains confidential information we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who your customer is and what they want a generic answer does not necessarily meet every customer's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear and concise contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do check and recheck your Bid before dispatch.

What makes a good bid – some simple do not's \otimes

DO NOT

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Customer to discuss your Bid. If your Bid requires clarification the Buyer will contact you.
- 7.16 Do not contact any UK SBS staff or Customer staff without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or Customer staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

Some additional guidance notes 🗹

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool may be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of UK SBS.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.33 Your bid will be valid for 60 days or your Bid will be rejected.
- 7.34 Bidders may only amend the Contract terms if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract and UK SBS fail to accept your legal or statutory reason is reasonably justified we may reject your Bid.
- 7.35 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.

- 7.38 Bidders should note that if they are successful with their proposal UK SBS reserves the right to ask additional compliancy checks prior to the award of any Contract. In the event of a Bidder failing to meet one of the compliancy checks UK SBS may decline to proceed with the award of the Contract to the successful Bidder.
- 7.39 All timescales are set using a 24 hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through Emptoris.
- 7.40 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, UK SBS may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to UK SBS during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

7.41 From 2nd April 2014 the Government is introducing its new Government Security Classifications (GSC) classification scheme to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

https://www.gov.uk/government/publications/government-security-classifications

UK SBS reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

USEFUL INFORMATION LINKS

- Emptoris Training Guide
- Emptoris e-sourcing tool
- <u>Contracts Finder</u>
- Tenders Electronic Daily
- Equalities Act introduction
- Bribery Act introduction
- Freedom of information Act