

Guidance for controlling the costs of buying goods and services

This document contains a brief summary of actions that are being made to policies and procedures. More detail will be issued in September 2018

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The following actions are being taken to control costs and release savings:

Devices (computers and IT)

All IT hardware will be purchased and managed centrally

To achieve value-for-money, DTS will centrally purchase, manage, store and dispose of all IT hardware. This includes technical bundles, mobile devices and data packages.

Technical device bundles will be developed for SHU job roles

A number of technical device bundles will be agreed and applied to specific SHU job roles. The value and specification of the bundles will vary to reflect the need of the role. In the first instance, the bundles will be developed and applied to the roles coming out of PSOM.

A mobile phone service will manage and monitor mobile phone provision

Mobile phones are currently managed locally; this will be changed so that DTS monitor provision and usage, in the same way that PCs and tablets are currently managed. This will mean there will be an appropriate number of phones in circulation, with a variety of models and packages, reflecting the needs of different roles. The overall aim being to reduce cost and ensure effective management of phones.

Criteria for new and non-standard hardware will be introduced

- cyclical replacement will be linked to usage rather than age of hardware
 - hardware provisioning will be automated for new starters, job changes and leavers by linking to HR processes
 - there will be an exception route for non-standard hardware that must link to either:
 - the annual planning process
 - project funding
 - external funding
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Improved asset management

Our asset management will be improved including linking cyclical replacement to usage. This will allow the extension of lifespan and a proactive identification of faults. This will deliver savings as well as providing better visibility of costs in future to enable better budgeting.

Furniture

All furniture will be purchased and managed centrally

The Facilities Directorate will centrally purchase, manage, store and dispose of all furniture, furnishings and accessories for all areas of the University. A furniture management plan will set out the process for this.

To achieve value-for-money, furniture will be of a consistent good quality across the estate with a minimum life expectancy of 5 years.

New furniture will be provided in certain circumstances only

- To replace broken furniture where there are no 'swap' items available;
- Where existing furniture is due for lifecycle replacement or no longer satisfies quality and suitability criteria;
- All new build and major refurbishment projects;
- Any refurbishment projects in student facing/high-profile areas;
- DSE and specialist furniture will be provided on request with relevant supporting information

Other requests for new furniture will not be supported.

Furniture will be repaired rather than replaced

Where economical, and depending on the age and quality, furniture will be repaired rather than replaced. Where furniture has been replaced through a project, the replaced furniture will be retained for redeployment in to other areas if it is in a reasonable condition and has an identified place for use.

Surplus furniture will be disposed of/recycled

Surplus furniture that cannot be reused will be disposed of through alternative use/recycling wherever possible. Old furniture will not be stored. Only a limited stock of replacement chairs will be kept in stock.

Furniture will be reviewed annually to assess condition and suitability for current and planned needs

Furniture will be replaced when it is considered to be no longer suitable for the University's needs. This will be based on an assessment which will be outlined in the furniture management plan. A lifecycle programme will be in place for furniture based on priority need and the lifecycle budget.

Where there is inconsistent furniture in student focussed areas it will be replaced.

Marketing

All marketing spend to be agreed with Marketing team

All marketing spend being considered must be agreed with the Marketing team to enable the following principles to be applied.

Course advertising must only be purchased by Marketing

Course advertising can be procured more effectively centrally rather than locally.

Only strategically important events should be sponsored

Resource across the University will be pooled to focus only on strategically targeted events.

Future engagements of external marketing and design agencies be agreed with Marketing

A case must be made to show the measurable impact of commissioning an external agency.

Marketing will centrally procure external services using agreed suppliers at preferential rates

Products to be given away for free should not be bought

The impact of investing in promotional giveaways and merchandising e.g. university branded pens and bags cannot be measured.

Where small value items could be beneficial, Marketing will bulk buy a limited range of these for Faculties and Directorates to call on when needed, reducing purchasing costs and wastage.

University print services to be used where possible for marketing materials

This aligns to guidance on printing covered in this document.

Further guidance and procedures to be developed to support the policy

The Marketing team will develop more detailed guidance on what can be classified as marketing, whilst also making clear the procedures through which expenditure is reviewed and approved.

Hospitality

Hospitality should only be provided in limited circumstances

- Meetings or training events with duration of 4 hours+ and where no local facilities are available
- Meetings with external visitors of the University where no local facilities are available or appropriate
- University recruitment events such as Course Open Days.
- Corporate or profile raising events.

Where Hospitality is required this will be delivered to key central locations

- Hospitality will be serviced from key locations on City and Collegiate campuses and will service the majority of the estate.
- Areas with current low-usage will not be catered but hospitality will be accessed via a chargeable SHU card service
- Catering for events will be in close proximity of all areas of the University.

Purchase cards should not be used to procure hospitality on University grounds

Catering Services will organise procurement of food and services from outside the University at weekends and out-of-hours, which will offer better value-for-money than overtime rates.

Staff can organise credit onto a SHU card or book vouchers to enable flexibility.

Our sustainability policy will reduce food waste

For further information see <https://www.shu.ac.uk/about-us/sustainability/food-and-drink>

Printing

Use Papercut technology to redirect print to the most economical printers

Papercut technology will be turned on to redirect print to the most economical printers. Multi-function devices (MFDs), the type of printer in many University locations, will automatically redirect documents over 500 pages to the Print shop, in line with our [sustainability policy](#)

Usage will be monitored and reported on.

Reduce amount of local printing

- Where people have laptops or iPads to take to meetings, printed handouts should not be necessary.
- Meetings which are held in AV-enabled rooms should not be supported by printed handouts - this is to be adopted & enforced by all.
- All exec assistants/support to boards & committees to ensure AV accessible digital format of meeting papers are available.

Note: this will produce stationery savings as well.

Introduce the use of a single external supplier for printing

A joint tender with the University of Sheffield is currently being undertaken which will reduce the cost of printing for work that needs to be outsourced.

Desktop printers are high cost and no longer required

All desk top printers to be phased out (date to be confirmed).

Cross-University Group to monitor print costs and usage

A University Print Group will monitor print usage, both internal and external, with the aim of reducing volumes, cutting waste and the carbon footprint.

Stationery

Ensure adherence to the National University Framework with Office Depot

The agreement covers stationery products/office supplies, toners/print cartridges and desktop delivery of paper; some items have been individually negotiated to obtain the best price. Only items with a blue 'C', indicating a contracted item, should be purchased.

A single paper contract will be established

The purchase of paper is done through several suppliers and not always at the best price. Procurement to review the Office Depot framework agreement to ensure that the supplier is providing the best market price.

Review stock levels and combine with other areas

Each area to target a significant reduction in stationery expenditure and review existing stocks across buildings. Local administrators to lead on this collectively and consider use of a single store in buildings.

Reuse office supplies whenever possible

Re-use rather than replace e.g. lever arch files, plastic wallets, document wallets.

Staff development and training

External training

Use of external training providers will be more tightly controlled

HR&OD and HS&W will ensure that attendance levels of courses and events that are delivered by external providers are maximised to reduce the frequency of delivery and reduce costs.

Further specific guidance will be produced regarding the procurement of learning and development services, external to the University. This will include advice on assessing the suitability of internal courses and programmes before looking externally.

Internal training

A sustainable internal programme of events, courses and programmes that are clearly aligned to the Strategy and business priorities is being developed

Work is underway to deliver new subjects such as Customer Service, Change Leadership, Appreciative Inquiry, and Personal Impact.

Further work is needed to consider options to develop the programme: investment in the e-learning offer so that more options are available online. There are currently various e-learning courses held on different platforms that can be brought together onto one platform to create a 'whole portfolio' of e-learning.

A consistent approach to training and development is needed across the University

A wide range of internal training courses is already available, particularly in the areas of management and leadership development. A number of new management development workshops have recently been added to the programme.

The guidance above will include information on identifying training needs through the PDR process, options for how training and development can be obtained internally or externally and support for managers in ensuring that individual learning is transferred and embedded.

Work more closely with other providers of internal training to ensure there is one source of easily accessible information

Staff will easily be able to look internally to identify courses that meet their needs. This will maximise the use of e-learning with a wider audience and ensure courses have optimum attendance. e.g. Working with RIO to integrate information on researcher development, the Epigeum e-learning module and provide guidance on research-related objectives within PDR to support preparations for the REF.

Staff recruitment

All costs for jobs.ac.uk to be centralised

Centralising costs should allow negotiation of deals which would benefit our brand. It is not expected to make significant financial savings e.g. There is a new bulk buy in place with Times Higher Education. This gives unlimited posts on the jobs pages for the same cost as previously advertising 34 vacancies per year and with additional editorial, which does not need to be recruitment-specific.

The use of search and selection agencies/head-hunters will be minimised and additional guidance has been produced

The need to use agencies must be discussed with HR & OD to agree necessity. New guidance is available on the intranet site [here](#).

It advises managers to speak with the recruitment team, consider lower cost alternatives, obtain PVC/Director authorisation and negotiate on fees before engaging.

HR & OD investigating providing head-hunting style service internally using 'Talent Acumen'

There has been some success using a service (Talent Acumen) which provides the team with the contact details of potential applicants and the recruitment team carry out the approach.

The team regularly considers this approach when advising recruiting managers and the decision to progress with this route lies with the manager. We are now tracking when this advice is given in order to assess the impact.

Other internal routes can be explored in addition to Talent Acumen e.g. access to LinkedIn profiles and CV finders. There is real potential for some roles but further consideration of which roles it may benefit us is needed. We can also further develop the social media profile of the University and use local and department networks/social media groups for specific roles as they arise.

More work will need to be done to identify and create capacity within the recruitment team and assess the resource implications of taking this type of approach.

Staff travel

All travel and accommodation (UK and overseas) must be booked through the University-appointed travel management companies (TMC)

Booking all travel and accommodation will enable us to collate good quality management information about staff travel choices and, from a safeguarding perspective, improve visibility of who is travelling where.

Note: The contract for the current travel company is due for renewal in the next academic year and a tender process will be underway shortly.

Updated versions of the Travel Policy, Expenses Policy and Purchase Card Policy will be issued in September and will expressly state that any expense claim, contravening the new Travel Policy, for hotel accommodation and travel booked after the 1st October, will be rejected. Accommodation and travel booked prior to this date will still be assessed in line with the previous version of the expenses and travel policy.

Flights

Greater scrutiny on use of business class

Travel by business class is currently an exception that requires approval by PVC Deans/Directors. Guidance on appropriate exceptions is being developed to ensure consistency across the University. Additional reporting of business class travel will be undertaken.

Select flights based on best price

Flights should be selected based on best price rather than carrier, class of flight, timing or routing. Cheaper flights that have been offered but declined will be monitored.

Book flights further in advance

Flights should be booked as far in advance as possible to obtain the cheapest price.

Accommodation

Select overseas accommodation based on best price

Accommodation should be selected based on best price, taking into account all other requirements e.g. location, facilities etc.

Agreed maximum rates for UK accommodation will become mandatory

Agreed maximum rates for UK hotels will become mandatory (currently these are guidelines):

- £90 per night for accommodation outside of London
 - £200 per night within Greater London
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Rail

Book rail tickets further in advance

Tickets should be bought at least 15+ days in advance to obtain the cheapest price.

Buy advance saver

Advance saver tickets are typically 46% cheaper than Anytime tickets.

**tickets instead of
anytime tickets**

**Book rail tickets
online instead of via
the telephone or
email**

All rail tickets should be booked online through Clarity's Go2book system. Booking online saves money in transaction fees.

General

**Reduce number of
staff attending the
same
event/conference**

Consideration should be given to the number of staff travelling to the same event/conference.

**Use video
conferencing**

Video conferencing should be considered instead of travelling to meetings both internally and externally.