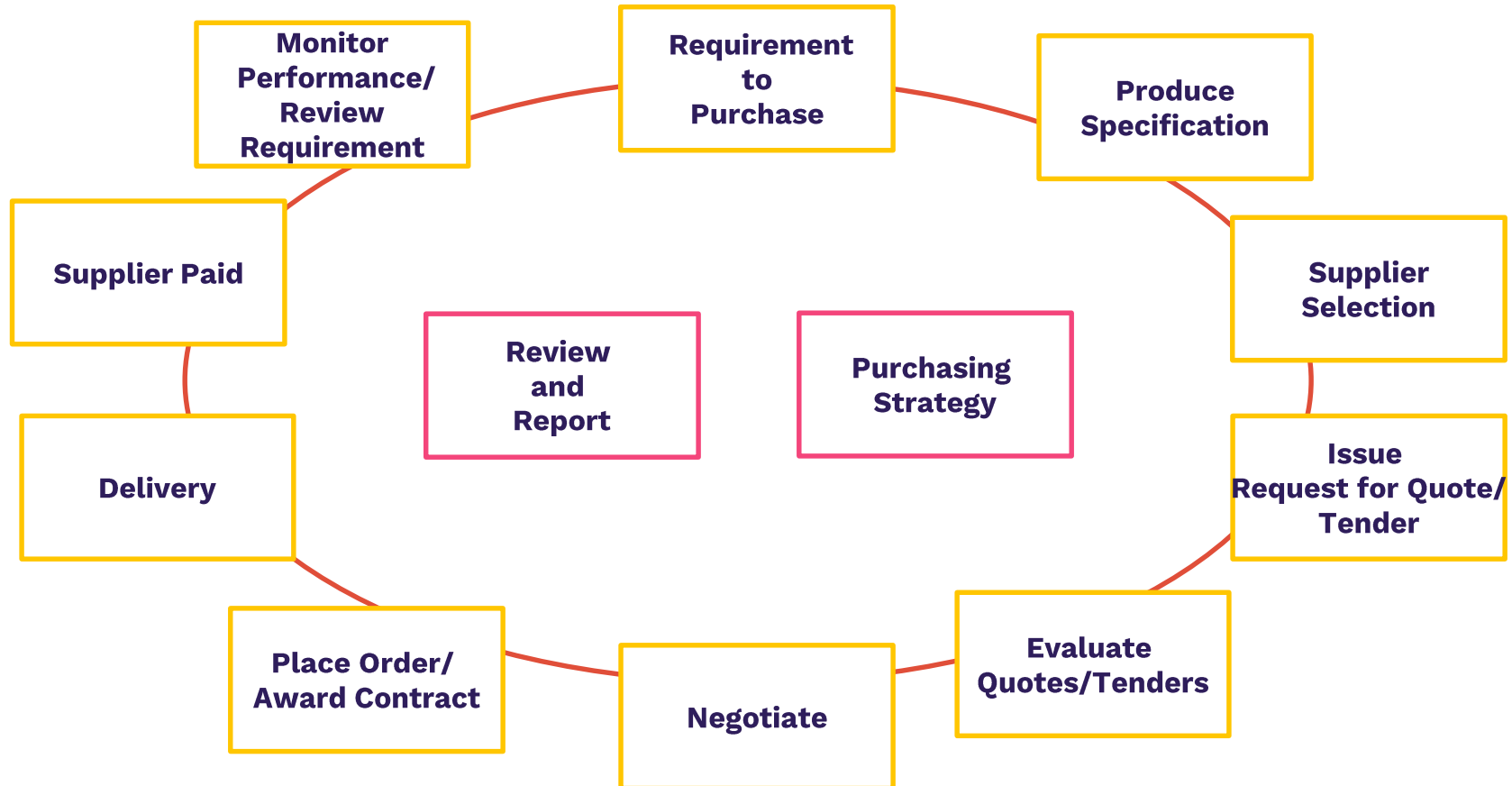


# Equality Purchase Cycle



# Requirement to Purchase

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- Is the purchase approved?
- Is the purchase ethically acceptable and not (in concept) in breach of equality principles?

# Produce Specification

- Who will this impact?
  - Obtain racial data for likely end users.
- Is the product need likely to differ by racial group?
- Is the way that it is delivered likely to differ by racial group?
  - Identify different groups needs
  - Consult end users
- Define spec based on needs
- Ensure specification is flexible enough to deal with changing equality requirements
- Can requirement or specification be split to add value?
- Cross check specification versus institution's Equality policy
- Are there any specific requirements / duties to include (reporting etc.) in spec in relation to equality ?
- Re-confirm specification

**Go to “highly relevant” purchases**

**Back to Purchase Cycle**

# Supplier Selection

- Decide on level of detail to be included on EOI
  - low level here and more info on RFQ/T: or
  - all included here
- Advertise for expressions of interest in (as applicable);
  - OJEU
  - Trade Press, Local Media
  - Web Sites
  - Chambers of Commerce, Regional Development Agencies & Meet the Buyer Exhibitions etc.
- Issue Questionnaires/ Info Sheets AND/OR check Supplier Assessment databases
- Evaluate supplier information obtained
- Provide supplier feedback
- Consult end users?

# Issue Request For Quote/Tender

- Issue Request for Quote(s)/Tender(s) to all suppliers at same time
- Ensure full specification now issued
- Consider splitting into specific portions if possible/value adding that may make it more accessible to SMEs/ethnic minority companies (but consider EU rules) – NOTE that positive discrimination is not lawful
- Ensure Request for Quote/Tender documents do not exclude any groups

# Evaluate Quotes/Tenders

- Are offers in line with Request for Quotes/Tenders?
- Are equality requirements dealt with effectively on tenders?
- Can full specification be met cost effectively?
- Involve end user community in evaluation if possible & relevant
- Identify best source(s) of supply

# Negotiate

- Variable dependant on legislation applicable
- Narrow field to preferred bidders
- Can equality provisions be enhanced?
- Costs negotiated
  - Further improved bids?
- Can full spec be met cost effectively?
- Involve end user community if possible & relevant
- Identify best source of supply

# Place Order/Award Contract

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- Is equality action plan required with preferred bidder?
  - Initiate action plan if required
- Place contract subject to Terms and Conditions including equality requirements
- If forced to order through supplier with significant equality issues due to lack of alternatives, record in internal contract file the information relating to the action taken to identify alternatives



# Delivery

- Is the method of delivery successfully complying with equality requirements of the specification & the Race Relations Act (RRA) generally ?
- Are persons involved in delivery aware of required equality based behaviours and performing to acceptable standards ?

# Supplier Paid

- Has supplier complied with all requirements including equality ?
  - If not, are there liquidated damages clauses applicable ?

# Monitor Performance/Review Requirements

- Is the delivery of goods or service delivery successfully complying with equality requirements of the contract?
  - If not, is an Equality Action Plan required?
- If of high relevance under the act:
- Are equality monitoring processes being complied with?
- Is supplier's action plan (if applicable) being followed through?
- Are persons involved in delivery aware of required equality based behaviours and performing to acceptable standards?
- Is provision still matching need and providing equality of access to purchased goods/ services?

# Purchasing Strategy

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- Include equality requirements in purchasing strategy and clearly identify action plan (can be separate document)
- Set targets for compliance based on priorities of proportionality and relevance

# Review and Report

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- Report on individual and collective supplier action plan developments?
- Report on number of Ethnic minority businesses being awarded contracts?

# Likely Highly Relevant Purchases <sup>(1)</sup>

All contracts are of the highest relevance however equalities will be more visible depending on level of contact etc.

- Consultant lecturers
- Assessors
- Maintenance
- Construction / Works
- Agency temp staff
- Consultancies / Consultants
- Nurseries / Child care facilities
- Printing & Design services
- Catering
- Cleaning
- Security
- Waste disposal
- External auditors
- Services to students (accommodation, computer services, libraries)
- Trading units on site

# Likely Highly Relevant Purchases <sup>[2]</sup>

Services Off Site (potentially highest relevance)

- Recruitment agencies
- Uniform Providers
- Advertising / Marketing agencies

Services Off Site (potentially high relevance)

- Publishers
- Legal advice
- Banking
- Insurance
- External research

And any other purchase situation where the supplier directly interacts with your staff or students or with members of the public in the vicinity of your facilities.