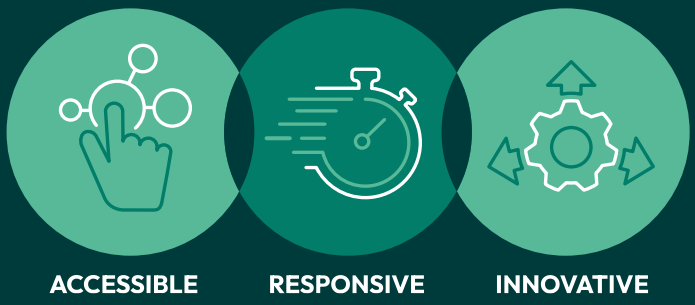
PS Connect

Responsible Procurement Strategy Document Version 1.1



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1. Introduction

This strategy supports:

- the **Sustainable Procurement Policy** and
- the **Social Value Policy**.
  These policies set the overarching principles, values, and commitments that guide our approach to procurement, outlining the University's intent to prioritise community benefits, environmental stewardship and ethical sourcing in its purchasing decisions. This strategy translates the broad goals of the policies by outlining the practical steps needed to ensure the procurement process aligns with our objectives. Together, the policies provide the 'why'—our organisational values and sustainability goals—while the strategy provides the 'how'—the concrete methods and practices to achieve those goals.
- alignment with **Strategy 2030**, the **Environmental and Climate Emergency Policy Statement**, the **Sustainable Food Policy** and the **Modern Slavery Statement**, while also incorporating strategic priorities such as Equality, Diversity and Inclusion. Our aim is to actively encourage suppliers and staff to adopt responsible practices and sharing responsible procurement best practice and positive news stories and relevant information to inspire and inform our community across the University and
- Compliance with the **Procurement Act 2023**, the **Environment Act 2021** and the **Social Value Act 2012**, contributing to the preservation of natural resources, reduction of carbon emissions, foster inclusive economic growth, address social inequalities, and enhance the overall welfare of our wider local region.
- the provision of resources and guidance for all staff to support the University's ongoing commitment to responsible procurement best practise. Appendix A outlines our strategic procurement-led activities for 2024-2025.

2. Scope and Ownership

All University staff members, suppliers and contractors engaged by the University are expected to adhere to the relevant provisions outlined in this strategy.
The Responsible Procurement Strategy, Sustainable Procurement Policy, Social Value Policy and **Supply Chain Charter** are owned and maintained by the Director of PS Connect (and Chief Procurement Officer) and are sponsored by the Chief Financial Officer and Executive Director of Finance, Infrastructure and Commercial Services (FICS). All documents will be reviewed every two years and performance against the action plan (Appendix A) will be monitored by the Director of PS Connect and Chief Finance Officer.

Further details and Key Performance Indicators can be found in Appendix B - Measurement and Reporting.

3. Definitions

The following definitions reflect the University of Exeter's chosen interpretations of these terms.

Responsible procurement means acquiring goods, services, and works in a manner that optimises value for money, adheres to procurement legislation, and seeks to benefit society and the economy while minimising environmental harm. This is achieved by integrating social value and sustainability into our procurement processes.

Sustainability ensures consideration of its three pillars (social, environmental and economic) to safeguard a business model that is sustainable long term. This looks at the goods, services and works that we are procuring as well as suppliers' business and operational practices. This approach ensures a whole life-cycle perspective that benefits the University and enhances economic well-being while minimising environmental and ethical impacts.

Social value measures the positive value and benefits we as an organisation can create through the procurement of goods, works and services for the local economy, communities and society within Exeter, Cornwall and surrounding areas, as well as nationally and internationally. While we prioritise local and regional impact, we recognise our wider responsibility to contribute to global social, economic, and environmental well-being through ethical and sustainable procurement practices.

4. Objectives

Work with suppliers actively aligned to our responsible procurement principles

To strengthen our commitment to responsible procurement we will increase our collaboration with suppliers who prioritise ethical and sustainable practices. This will be achieved by incorporating our responsible procurement questions set and weightings within our tenders and using available resources to monitor and review the responsible procurement progress of our Strategic suppliers.

To ensure the supply chain is kept engaged with our responsible procurement journey, we will conduct annual webinars to provide updates on responsible procurement to our supply chain. We will also host an annual responsible procurement supply chain event, which may be organised in collaboration with internal teams to support specific strategies (such as EDI, biodiversity and circular economy).

Engage with staff and students on how to buy responsibly

We will foster a culture of responsible purchasing among staff and students by educating them on ethical consumption principles, promoting sustainable and mindful purchasing practices, and raising awareness about the environmental, social, and economic impacts of their purchasing decisions.

Specifically, we will:

- Conduct annual training sessions for all staff to enhance understanding and adoption of responsible procurement best practices.
- Organise annual student engagement activities to actively promote SDG 12 on responsible consumption and production.
- Ensure our website remains updated with positive news stories and relevant information to inspire and inform our community.
- Comply with the new Procurement Act 2023 requirements such as maximising public benefit (Introduction, Section 12.1.a), the shift from MEAT (Most Economically Advantageous Tender) to MAT (Most Advantageous Tender) (Chapter 2, Section 19) and publishing KPIs for contracts valued at over £5 million (Chapter 5, Section 52).

Through these efforts, we aim to empower our community to make informed and conscientious decisions when purchasing on behalf of the University. Additionally, we will establish a mechanism for receiving feedback, allowing staff and students to share suggestions or comments on our processes. This ensures continuous improvement and responsiveness to the needs and perspectives of our stakeholders.

Collaborate across the sector for best practice

To foster collaboration across the public sector on responsible procurement practices, promoting partnerships and providing support across all areas of responsible procurement.

We will achieve this by maintaining our involvement in and partnership with other public sector organisations focused on responsible procurement. For involvement we lead on we will host regular meetings to facilitate knowledge-sharing, exchange best practice and address common challenges collaboratively.

Monitoring, reporting and reviewing responsible procurement activities

We aim to build a culture of continuous improvement through regular reporting and review of our procurement activities. We will monitor and assess the impact of our procurement efforts using external and internal reporting mechanisms, such as balance scorecards and assessments against progress towards the ISO20400:2017 Sustainable Procurement Standard.

Annually, we will review and update this strategy to ensure alignment with leading practices in responsible procurement. Additionally, we will conduct best practice reviews each year, including staff and supplier feedback surveys, training and awareness and performance tracking.

To enhance communication and collaboration, we will facilitate feedback from our supply chain through supplier relationship meetings and participation in our events. For staff and students, we will establish clear communication channels to gather feedback on processes and information and share these at our staff and student events and publish details to our website & the PS Connect portal.

Integrating lessons learnt and reporting as a strategic objective is crucial for continuous improvement, better decision-making, increased accountability, and transparency. It helps improve performance, manage knowledge, reduce risks, and foster a learning culture.

Further details and Key Performance Indicators can be found in Appendix B - Measurement and Reporting.

5. Supply Chain Engagement

As a supplier, your role is pivotal in supporting our responsible procurement objectives. As outlined under '5. Activities - Procurement Services', we are committed to allocating a proportion of the overall tender evaluation scores to criteria associated with responsible procurement. Our assessment of suppliers' responsible procurement practices flows throughout our procurement activities, from specification development to evaluation, contract award, supplier review meetings and any contract extension stages.

Strategic suppliers (Tier 1) are required to adhere to our **Supplier Chain Charter** encompassing social, environmental, and ethical compliance standards.

The University is dedicated to working with suppliers that reflect our own commitments. These include, but are not limited to, collaborating with suppliers who share our commitment to preventing modern slavery and human trafficking, ensuring the safety of workers throughout their supply chain, alignment with disability accreditations, supporting the Armed Forces Covenant, and ensuring equal rights through their company via their equality, diversity, and inclusion commitments.

To further strengthen our commitment to responsible practices, we will prioritise collaboration with suppliers who meet sustainability standards such as ISO 14001 accreditation. By doing so, we ensure that our partners uphold rigorous environmental management practices and align with our sustainability goals. Additionally, we value suppliers who adhere to other recognised sustainability standards, reinforcing our dedication to ethical, safe, and inclusive operations throughout our supply chain.

6. Activities

Mandated responsible procurement criteria in all tenders

Tender Type	Responsible Procurement Weighting	Sustainability and Social Value Criteria	Additional Notes
Above £50,000	30%	Mandated requirement* to include both Sustainability and Social Value criteria as part of the evaluation weighting, with at least one weighting not less than 10%.	Current threshold values can be found in our Financial Regulations
Below £50,000	Discretionary requirement to consider and apply responsible procurement practices where appropriate	Use the **Responsible Procurement Checklist** or incorporate relevant questions drawn from the UNSDGs into the evaluation method. A small question bank is available on our website (link) as a starting point.	

*Where the University utilises a pre-established Framework, Dynamic Purchasing Systems (DPS) or Dynamic Markets (DM), the above weightings should be adhered to if the conditions allow. Where the conditions do not allow 30% for Responsible Procurement, this should be clearly set out with evidence as to why in the procurement tender documentation and sign off by the Sustainability or Social Value Lead within Strategic Procurement will need to be sought.

Staff Guidance and Training

The strategic procurement team will help educate and raise awareness for all staff through guidance and training to enhance understanding and adoption of responsible procurement best practices. In addition, staff are invited to register to the Higher Education Procurement Association (HEPA) & attend the following courses:

Procurement Services advise that anyone procuring on behalf of the University completes the **Intro to Sustainable Procurement** e-learning course available on HEPA. This course should take approximately 2 hours to complete. Access to HEPA is free of charge via the University's membership.

Those that would like to have a deeper dive in to Sustainable procurement can also complete the **Advanced Sustainable Procurement** e-learning course available on HEPA. The time needed to complete this course will depend on your previous knowledge, but it is anticipated that it will take no longer than 1 hour to complete.

In addition to the above the Strategic Procurement team will also individually undertake the **IEMA Approved Sustainable Procurement** course. This ensures we strengthen our collective knowledge and expertise in sustainable procurement practices, reinforcing our dedication to responsible purchasing.

Further Responsible procurement guidance and resources:

- Chartered Institute of Procurement and Supply (CIPS) - **Ethical and Sustainable Procurement Guide**
- UK Universities Purchasing Consortia (UKUPC) – **Responsible Procurement Glossary**
- Sustainable Procurement Collections- **The Government Buying Standards (GBS)**
- Government Commercial College - **Tackling modern slavery in supply chains: PPE case study**
- The Exeter Centre for Circular Economy - **Circular Economy Masterclass**
- University of Exeter **- Corporate Conscience**
- University of Exeter - **Environment and Climate Emergency Induction**
- Government Commercial College – **Social Value**
- Supply Chain Sustainability School **– Selection of courses on Responsible Procurement**

7. Appendix A – Timeline of Activity

Strategic Procurement activities 24/25

Quarter	Activity
Q1 24/25	**Strategic Procurement Team to refresh Responsible Procurement commitments into Category Plans** - integrate responsible procurement criteria into the updated Category Plans. This might include adding sustainability benchmarks, ethical sourcing standards, and social value considerations to the plans, ensuring that all procurement categories align with this strategy.
Q1 24/25	**Bi-Annual meeting with GW4 Responsible Procurement Group** - A collaborative meeting with the GW4 Responsible Procurement Group, a partnership among Bath, Bristol, Cardiff and Exeter Universities in the GW4 alliance, to discuss best practices, share progress, and plan joint initiatives in responsible procurement.
Q1 24/25	**Analyse carbon data outputs for 23/24 for scope 3** - focus on the carbon emissions data related to Scope 3, which includes indirect emissions from the university's supply chain. The data will help identify high-emission areas and opportunities for reduction.
Q2 24/25	**Responsible Procurement Strategy, Supply Chain Charter and updated bought goods and services policy (now Sustainable Procurement Policy) to be published** - The publication of these key documents outlines the university's commitment to responsible procurement.
Q2 24/25	**Hold first all staff responsible procurement event** - An event aimed at educating all staff about responsible procurement practices, encouraging them to consider sustainability and ethics in procurement decisions and inform staff about our newly launched strategy and policies.
Q2 24/25	**ACT & CEC Board meetings** – submitting this strategy for approval by the board.
Q3 24/25	**Attend Faculty Departmental meetings to promote Responsible Procurement** - Engaging with various faculty departments to promote the principles and practices of responsible procurement. This could involve presentations, discussions on integrating these practices into departmental operations, and collecting feedback.
Q3 24/25	Review and update the supplier outward facing webpages for Responsible Procurement - revising the public-facing sections of the procurement website that address responsible procurement policies and practices. The updates will include our Supply Chain code of conduct and compliance information aimed at strategic suppliers to ensure transparency and alignment with the university's responsible procurement goals.
Q3 24/25	**Hold responsible procurement annual supplier event** - engage suppliers in discussions about responsible procurement, including sustainability practices, ethical sourcing, and

	compliance with the university's standards. It serves as a platform to educate and motivate suppliers to align with the university's values.
Q3 24/25	**Review responsible procurement check list** - A thorough review of the responsible procurement checklist to ensure it covers all necessary criteria, such as sustainability standards, ethical sourcing, and compliance with regulations.
Q3 24/25	**Review the Responsible Procurement questions set** - Updating the question set used to evaluate suppliers' responsible procurement practices in tenders, ensuring that it reflects current standards and expectations.
Q3 24/25	**Internal audit review of contract management processes to ensure sustainability is included** - An internal audit to assess whether sustainability considerations are effectively integrated into contract management processes. This review aims to identify gaps and recommend improvements.
Q3 24/25	**Termly supplier webinar** - Continuation of the supplier engagement series, focusing on sharing best practices, new regulations, and organizational expectations regarding responsible procurement.
Q3 24/25	**Student engagement – SDG teaching week** - Activities and events focused on the United Nations Sustainable Development Goals (SDGs), educating students about sustainable practices and how they can contribute through their studies and future careers.
Q3 24/25	**Modern Slavery statement refresh** - An update to the university's Modern Slavery Statement, ensuring compliance with legal requirements and reflecting current efforts to prevent slavery and human trafficking in the supply chain.
Q3 24/25	**ISO 14001 Surveillance Audit** - An external audit to verify that the university continues to meet the requirements of the ISO 14001 standard, which focuses on effective environmental management systems.
Q3 24/25	**Bi-annual review** - A comprehensive review of the responsible procurement strategy and its implementation, assessing progress against objectives and identifying areas for improvement.
Q3 24/25	**Collaborate with Procurement Operations team to start embedding responsible procurement ideals** - Working closely with the Procurement Operations team to integrate responsible procurement principles into everyday procurement activities, processes, and decisions for low value purchases.
Q3 24/25	**Review and implement the recommendations from the Internal Audit of Sustainability Culture -** assessing current gaps, identifying key areas for improvement, and developing a timeline for integrating the audit's findings into our policies, procedures, and organisational culture.
Q4 24/25	**Integration of ISO20400:2017 Requirements and Evidence within Strategic Procurement SharePoint Site** - Ensuring that the procurement team's SharePoint site includes all necessary documentation and evidence to demonstrate compliance with ISO 20400:2017, the international standard for sustainable procurement.

Q4 24/25	**Social Value Policy review** - Reviewing the Social Value Policy to ensure it aligns with current best practices and legislative requirements, focusing on maximizing the positive social impact of procurement activities.
Q4 24/25	**Internal Audit ISO20400:2017** - An internal audit to assess compliance with ISO 20400:2017, ensuring that sustainable procurement practices are well-integrated and effectively managed within the university.
Q4 24/25	**Carbon accounting methodology review** - A review of the methods used to calculate carbon emissions, particularly in relation to the university's supply chain (Scope 3 emissions), to ensure accuracy and identify opportunities for improvement.
Q4 24/25	**Social Value Progress Report for Compliance review** – Prepare for the progress report to evaluate the implementation of the Social Value Policy and achieving associated targets. This review helps ensure compliance with both internal standards and external regulations.
Q4 24/25	**Website review -** thorough review of the procurement website to ensure all content is up-to-date, relevant, and reflective of the university's responsible procurement initiatives and achievements.

8. Appendix B – Measurement and Reporting

The Chief Procurement Officer and the Director of Sustainability will ensure reporting against the KPIs within this policy is undertaken annually to the Climate and Environment Crisis Board (CEC).

We will monitor and report on the performance measures contained in Appendix B via the Balance Scorecard Report, which requires monthly/quarterly and annual reporting depending on the KPI. We seek to improve the way we measure the impact of our procurement activities including carbon emissions and social value and will focus these efforts on high value, high impact and/or high-risk commodities.

To enable the University to report, monitor, track and evaluate the effectiveness of our sustainable practices, strategic suppliers will be expected to provide the university with sustainability reports detailing their social, carbon and environmental footprint, their sustainability targets and action plans. We will use this to support its carbon accounting by tracking emissions reduction in Scope 3. We will support suppliers' development of these reports before they become a contract deliverable.

Key Performance Indicators

KPI	Description	Baseline	Annual Target
1	Reduction in carbon emissions associated with supply chain to support the University wide commitment to be net zero across all scopes by 2030.	TBC*	Net zero by 2030
2	Percentage of Tier 1 and Tier 2 suppliers who have signed our Supply Chain Charter, with all new onboarded suppliers signing within the first month of the contract.	0%	100%
3	Percentage of Tier 1 and Tier 2 suppliers who are onboarded to EcoVadis per year and are measured and have a current business "sustainability rating" assessment in place.	20%	80%
4	Percentage of Tier 1 and Tier 2 procurement led supplier relationship management (SRM) meetings which include discussions on responsible procurement.	0%	100%
5	Number of staff engagement events held to encourage collaboration, shared learning and improvements per year.	0	1 (min)
6	Number of student engagement events held to encourage collaboration, shared learning and improvements per year.	0	1 (min)
7	Number of supplier engagement events held to encourage collaboration, shared learning and improvements per year.	1 (min)	1 (min)
8	Percentage of tender published per year that, where possible, include a responsible procurement evaluation criterion of at least 30%, with questions drawn from the United Nations Sustainable Development Goals and the Social Value TOM System™ of Themes, Outcomes and Measures relevant to the product or service to be bought.	0%	100%
9	Percentage of Strategic Procurement Team who have obtained ISO20400:2017 Sustainable Procurement training certification.	83%	100%

*The 2018/2019 original baseline is currently under review and this figure will be updated once finalised.

Version	1.1
Last updated/approved	21st of November 2024
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