

PROCUREMENT ACTION PLAN 2015/2016 22.02.2016

Ref No.	Activity	Responsibility	Key Actions 2015 / 16	Procurement dept. Delivery Action Plans
1	MANAGEMENT			
1.1	Produce bi-annual reports to Finance and Audit Scrutiny Committee on all procurement activity undertaken in the preceding period and any efficiencies identified.	Procurement Manager	Ensure the Contracts Register is up to date. Keep records of all Procurement activity required for the report.	<i>In order to ensure that this contact register is kept up to date, we have asked Heads of Service to arrange for the Contact Register to be updated on a quarterly basis. The updates are to be completed by the first working Monday in April, July, October and January.</i>
1.2	Work with service areas / end users to develop clear / robust quotation / tender documentation ensuring their specification is in line with business needs of the Council, where appropriate.	Procurement Manager / Procurement Officer / Service Area Representatives	Promote project style procurement exercises.	<i>Further work needs to be done with Managers and key Stakeholders to ensure Procurement is embedded in the business plans / process at an early stage. We have carried out a review of the contract register and identified current contracts that, potentially, need to be reviewed. We are arranging to meet with the named contacts. A procurement workload programme will be put together to capture all tendering opportunities once these meetings have been completed.</i>
1.3	Service plans and team operational plans to reflect planned tender activity.	Senior Managers	Service Managers to review as part of Service Plan process.	<i>Currently investigating if there are any new business intensions which need to be dovetailed onto future procurement work plans.</i>
1.4	Encouraging local suppliers, SME's and the voluntary and the third sector to compete for Council contracts and ensure such opportunities are promoted locally.	Procurement Manager / Economic Development	Identify opportunities for SME's within the procurement process. Promote the use of the e.tendering portal to potential suppliers either through clear links on the external web site and on other communication tools, where applicable.	<i>Investigating signing up to Small Business Friendly Procurement Charter. Have inserted the following rules in the new Procurement Code of Practice - "A minimum of two local Suppliers must be invited to bid. In order to promote procurement opportunities and increase the number of local SME's registered on the E Portal, invitations to Participate will be circulated using Federation of Small Businesses weekly e mail".</i>
1.5	Ensure that there are no unintentional breaches in the EU procurement threshold.	Procurement Manager/Heads of Service	Contract Register Annual Review (See M5) Evaluation of 2014 Spend Analysis (see S1). Contract management by end users.	<i>See item 1.</i>
1.6	Maintain contracts register	Heads of Service	On-going updating as contracts awarded. On-going review of contracts register by Heads of Service Annual review of register of include details of annual spend.	<i>See item 1. Seeking to employ a data input clerk on a temporary basis to update In tend contract management section.</i>
1.7	Quarterly publication of Contracts Register	Procurement Officer	Quarterly publication of register in line with the requirements of the Transparency Code	<i>See item 1.</i>

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1.8	Carry out procurement awareness training sessions to increase and maintain knowledge of procurement regulations and the Council's policies	Procurement Manager	<p>Keep up to date with any changes in procurement legislation.</p> <p>Carry out training in a timely manner to prevent the Council being in breach of any legislation changes.</p> <p>Work closely with the Legal team and other local Councils.</p> <p>Share 'best practice'.</p>	<i>Further training to be provided in 2016</i>
1.9	Lead on procurement activity in line with the Code of Procurement Practice.	Procurement Manager / Procurement Officer	<p>Involvement in all tender processes. To be monitored as part of contracts awarded.</p> <p>Utilise procurement plans to agree support requirements</p>	<i>Ongoing</i>
2	POLICIES			
2.1	Review and update Code of Procurement Practice.	Procurement Manager	Incorporate changes to procurement legislation and the Council's business requirements.	<i>Amended C o P drafted, intended to report to April 2016 Executive.</i>
2.2	Review and update Procurement Strategy document and update actions for the forthcoming year.	Procurement Manager	<p>Incorporate changes to in procurement legislation and the Council's business requirements.</p> <p>Progress to be reviewed as part of bi-annual reporting to F&A.</p>	<i>Ongoing</i>
3	SUPPLIER MANAGEMENT			
3.1	Undertake an annual audit of spend and number of transactions.	Procurement Manager / Exchequer Manager	<p>Undertake an annual Spend Analysis of suppliers.</p> <p>Production of monthly Service Plan Measures ie transaction numbers, where applicable.</p>	<i>Have begun investigations into utilising a CCS framework to carry out an analysis of our spend and categorise into Proclass categories. My aim is to implement cost saving opportunities taking into account the totality of our spend in each category and to optimise economies of scale.</i>
3.2	Reduce the number of tenders for each supply area through collaboration of tender opportunities.	Procurement Manager / Procurement Officer	<p>Consolidating services, using the Spend Analysis, Contracts Register and procurement plan for future procurement activity.</p> <p>Work with other local councils to identify collaboration</p>	<i>Ongoing</i>

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3.3	Ensure all suppliers are contracted formally (preferably on the Council's terms).	Procurement Manager / Service Area Managers	Use of Contract Register and Spend Analysis. Ensure all signed contract agreements are filed and recorded with Document Management Store.	Ongoing
3.4	Work towards reducing the number of invoice transactions with current suppliers and new suppliers via the tender process.	Procurement Manager / Procurement Officer / Service Area Managers / officers	As part of the contract renewal process look at ways of reducing the number of invoices by consolidation of invoices. Make the invoicing process part of the business requirements, where applicable. As part of the contract management process work with suppliers on ways of reducing invoices submitted, where applicable Work with the Exchequer team to see how we can ensure invoicing is in line with our system capabilities.	See 3.1 <i>Exchequer Team leading on feasibility work for E-invoicing/auto-matching of creditor invoices.</i>
3.5	Review of Procurement Card spending levels and activity.	Exchequer Manager/Procurement Manager	Monthly publication of use of Procurement card on website. Annual Review of card usage Review Spend Analysis low value items.	<i>Working towards providing Procurement card spend on a quarterly basis Analysis of 2015/16 to be produced in April 2016.</i>
4	SUSTAINABILITY			
4.1	Identify key procurement activities and for each assess main sustainability issues to be addressed	Procurement Manager / Heads of services	Ensure opportunities to the market cover any key sustainability areas and questions for consideration	<i>Drafted an Ethical Procurement Statement and Sustainable Procurement Policy and embedded it in the Procurement Code of Practice.</i>
4.2	Identify and document appropriate procurement criteria for key procurement activities	Procurement Manager / Heads of services	As part of the review of procurement documentation work with the Sustainability and Climate Change Officer to ensure key standard questions are incorporated in documents	<i>Reviewing tender documentation to ensure it captures responsible Procurement practice elements in the tendering / contract management process.</i>
4.3	For ongoing contracts, set up process for reviewing sustainability requirements as existing contracts are due for renewal	Procurement Manager/Heads of Service	Part of contract management. To be included within Procurement training "workshop 2".	Ongoing
5	COLLABORATIVE PROCUREMENT			

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5.1	As part of the pre tender process explore the use of buying consortia for the bulk purchase common goods and utilities, for example through ESPO, Fusion 21, Home & Communities Agency, PRO5 or Crown Commercial Services.	Procurement Manager /Property Services	Details to be reported as part of bi-annual reports to members.	Ongoing
5.2	Investigate and where applicable enter into joint arrangements for procurement of goods and services with other Local Authorities.	Procurement Manager	Details to be reported as part of bi-annual reports to members.	Ongoing
5.3	Utilise framework agreements as a preference to negotiating local agreements for high value contracts of general goods and services (e.g. IT hardware, telecoms, energy).	Procurement Manager / Heads of services	Details to be reported as part of bi-annual reports to members.	Ongoing
5.4	Where possible ensure that the letting of contracts permits use by other Local Authorities within the WMRIEP area.	Procurement Manager / Procurement Officer	Where applicable include a clause in the tender / Contract documentation that permits the use by other Local Authorities within the WMRIEP area.	Ongoing
6	E-COMMERCE			
6.1	Ensure staff that are involved in procurement are capable and trained in the use of the e-tendering software.	Procurement Manager / Financial Services Manager	To seek to get officers to use CSW-JETS (Intend) for quotes up to £50k.	Seeking further training options
6.2	Promote use of e-tendering software for Contract Management	Procurement Manager	Review use of Contract Register/Management tool in CSW-JETS	Looking to develop Intend to include Contract Management and Key Performance Indicators and to roll it out so it can be used by Contract Officers.
6.3	Utilise Project Management tools to assist in Procurement Plans	Procurement Manager	Identify suitable software solutions Arrange training for Procurement team members	See above
7	PROSPERITY AGENDA			
7.1	Provide procurement support to prosperity agenda initiatives.		Support actions detailed in November 2014 Executive report.	See 1.4
7.2	Consider how the procurement function may directly contribute to the prosperity agenda.	Procurement Manager	Consider the feasibility of including contract clauses to support the prosperity agenda in future tender opportunities, e.g. local employment, National Living Wage, apprentices	See 1.4
7.3	Support local businesses	Procurement Manager/Economic Development and Regeneration Manager	Consider signing up to the Small Business Friendly Procurement Charter Committing to support small businesses.	See 1.4
8	CONTRACT MANAGEMENT			
8.1	Active appropriate contract management	Heads of Service	Ensure contract managers appropriately trained and understand requirements of their role.	See 9.1. Looking to develop Intend to include Contract Management and Key Performance Indicators and to roll it out so it can be used by Contract Officers.

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8.2	Arrange contract management training	Procurement Manager/HR/Heads of Service	Generic training being arranged by Procurement HR as part of "workshop 2". Service specific training to be arranged by appropriated Head of Service.	See 9.1
9	AWARENESS / TRAINING			
9.1	Work with Members, Managers and Officers to increase education and awareness of regulations and the Council's Policies.	Procurement Manager / HR Training / Heads of Service	Identify who needs training and level of training required Break the training down into specific workshops: Awareness, Practical, CSW-JETS	<i>Advanced Procurement Training and Contract Management training to be arranged to take place in 2016.</i>
9.2	Disseminate the strategy to officers and members.	Procurement Manager	Reports to Executive, Finance & Audit Scrutiny Committee and SMT.	See 9.1 & 10.1
9.3	Arrange contract management training for all staff involved with contract management.	Procurement Manager / HR Training / Head of service /Service Area Managers	To be included in Workshop 2 "practical" training	See 9.1
9.4	Provide support and training for senior staff involved in procurement activities and members as required.	Procurement Manager /Procurement Officer / HR Training	Identify further training requirements and deliver on a 1:1 if required	See 9.1
10	INFORMATION & WEBSITE			
10.1	Maintain current procurement information on the Council website.	Procurement Manager / Procurement Officer	Ensure information held on both the website and the intranet is current and kept up to date. Review information frequently	<i>Currently producing a "Procurement Toolbox "which will include templates, guidance notes, Procurement Strategy and Procurement Code of Practice and other helpful material.</i> <i>Will update Council website and intranet with "Procurement Toolbox "and to make it enhance Procurement visibility. Ensure Procurement opportunities are clearly marketed and to inform as necessary any update in procurement practices.</i>
10.2	Utilise the Council Website and other public sector opportunity outlets such as Contracts Finder to inform the market of the opportunities available and how to access them.	Procurement Manager / Procurement Officer	Ensure Procurement opportunities are clearly marketed Refer where applicable suppliers who contact WDC to the CSW-JETS website to view opportunities and register if applicable.	SEE 10.1
10.3	Maintain standard pro-forma documentation on the Council intranet.	Procurement Manager / Procurement Officer	Review and amend documentation when applicable	SEE 10.1
10.4	Utilise intranet to inform on procedures and any changes in best practice guidance.	Procurement Manager	Use intranet to inform as necessary any update in procurement practices.	SEE 10.1