

## Appendix 4 - Corporate Procurement Strategy 2016 – 2019 : Action Plan

Action step	Specific activity	Responsible person	Deadline	Necessary resources	Potential challenges	Complete
1. Implementation of Strategy	<ul style="list-style-type: none"> <li>Strategy approved by CEB</li> </ul>	Caroline Wood	Dec 15	CEB	<ul style="list-style-type: none"> <li>Strategy not agreed</li> </ul>	
	<ul style="list-style-type: none"> <li>Communication plan drafted and implemented</li> </ul>	Caroline Wood	Dec 15			
	<ul style="list-style-type: none"> <li>Attendance at HoS senior management meetings</li> </ul>	Caroline Wood, Nicky Atkin, Paul France	Jan 16	Service Areas Financial Services		
	<ul style="list-style-type: none"> <li>Strategy published on intranet and website</li> </ul>	Matt Stevenson	Jan 16			
	<ul style="list-style-type: none"> <li>Action plan implemented</li> </ul>	Caroline Wood	Jan 16	Financial Services		
2. Approved list in place for works and waste	<ul style="list-style-type: none"> <li>Advertise opportunity</li> <li>Evaluate responses</li> <li>Appoint to list</li> <li>Publish user guides on Intranet</li> </ul>	Gerri Ward	Nov 15 (Works, Waste Jan 16)	Direct Services Housing Management	<ul style="list-style-type: none"> <li>Lack of interest from market</li> </ul>	Works 90%  Waste 30%

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<p>3. Review and reduce off-contract spend</p>	<ul style="list-style-type: none"> <li>• Run spend reports from Agresso and compare to Contracts Register</li> <li>• Agree future requirements with Service Area(s)</li> <li>• Conduct procurement process</li> </ul>	<p>Caroline Wood</p> <p>Nicky Atkin, Paul France</p> <p>Nicky Atkin, Paul France</p>	<p>Mar 17 and then annually</p> <p>Delivered in year</p>	<p>Financial Services Service Areas</p>	<ul style="list-style-type: none"> <li>▪ Lack of support from Service Areas</li> <li>▪ Resourcing pressures</li> </ul>	
<p>4. Mystery shopper/feedback system for suppliers</p>	<p>Design simple questionnaire for inviting feedback and launch on website and include link in procurement templates</p>	<p>Matt Stevenson</p>	<p>Sept 16</p>	<p>Business Improvement</p>	<ul style="list-style-type: none"> <li>▪ No feedback received</li> </ul>	
<p>5. Shape and influence collaborative procurement networks</p>	<ul style="list-style-type: none"> <li>• Compare contract register and work plan with relevant bodies to identify collaborative opportunities</li> <li>• Establish links with bodies</li> </ul>	<p>Nicky Atkin, Paul France</p> <p>Caroline Wood</p>	<p>Mar 16 and then annually</p> <p>Sept 16</p>	<p>Financial Services Service Areas</p> <p>Financial Services</p>	<ul style="list-style-type: none"> <li>▪ Potential resistance to change buying habits or services may inhibit collaboration</li> <li>▪ Lack of support/resources from</li> </ul>	

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	where previous relationship did not exist			Service Areas Other relevant public bodies	other bodies may again inhibit collaboration	
6. Embed category management approach	<ul style="list-style-type: none"> <li>• Design categories</li> <li>• Spend analysed using agreed categories and is reviewed against contracts register</li> <li>• Category management light approach agreed</li> </ul>	Caroline Wood	<p>Jan 16</p> <p>Mar 16</p> <p>Mar 16</p>	Financial Services Service Areas	<ul style="list-style-type: none"> <li>▪ Work programme and competing priorities on resources restricts ability to undertake category reviews</li> </ul>	
7. Annual work programme agreed	<ul style="list-style-type: none"> <li>• Complied by reviewing the contracts register, Service Area plans, and from spend analysis</li> </ul>	Caroline Wood	Annually	Service Areas Financial Services	<ul style="list-style-type: none"> <li>▪ Work programme not fully inclusive of all projects</li> <li>▪ Insufficient resources to deliver the work programme or savings</li> <li>▪ Competing priorities on resources impacts ability to deliver</li> </ul>	
8. Implement customer satisfaction surveys	<ul style="list-style-type: none"> <li>• Questionnaire developed and launched for all projects led by the corporate team</li> </ul>	Matt Stevenson	Sept 16	Business Improvement	<ul style="list-style-type: none"> <li>▪ No feedback received</li> </ul>	

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<p>9. Ensure that supply chains conform to Council's ethos, policies and goals</p>	<ul style="list-style-type: none"> <li>• Procurement documentation in toolkit updated and cascaded via Procurement Champions and Service mtgs</li> <li>• Meet the Buyer event held</li> <li>• Selling to the Council material on website updated</li> </ul>	<p>Paul France</p> <p>Nicky Atkin</p> <p>Matt Stevenson</p>	<p>Mar 16</p> <p>Jan 16, Jan 17, Jan 18</p> <p>Apr 16</p>	<p>Financial Services Procurement Champions Federation of Small Business Thames Valley Chamber of Commerce</p>	<ul style="list-style-type: none"> <li>▪ Ensuring that officers who conduct procurements fully understand requirements and use the appropriate templates</li> </ul>	
<p>10. All relevant suppliers adhere to the Council's policy throughout duration of the contract</p>	<ul style="list-style-type: none"> <li>• New flexi-fields added to Agresso CAM to flag and monitor obligation</li> <li>• Data for existing contracts updated in CAM</li> <li>• Design contract monitoring system and launch on key contracts</li> <li>• Identify key suppliers who</li> </ul>	<p>Matt Stevenson</p> <p>Matt Stevenson</p> <p>Caroline Wood</p> <p>Caroline Wood</p>	<p>Dec 15</p> <p>Mar 16</p> <p>Mar 16</p> <p>Sept 16</p>	<p>Financial Services Business Improvement</p> <p>Service Areas</p> <p>Business Improvement Procurement Champions Contract Mgrs</p> <p>Business Improvement</p>	<ul style="list-style-type: none"> <li>▪ Availability of resource to implement change due to the Agresso upgrade</li> <li>▪ Information not available if contracts are not held centrally by the corporate team</li> <li>▪ Key suppliers don't want to become</li> </ul>	

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	<p>are not Living Wage accredited and work with the Living Wage Foundation to promote the benefits of becoming accredited</p> <ul style="list-style-type: none"> <li>• Host event with the Living Wage Foundation, possibly as part of a Meet the Buyer event</li> </ul>	Nicky Atkin	Jan 18	<p>Contracts Mgrs Living Wage Foundation</p> <p>Living Wage Foundation</p>	accredited	
11. Increase social value to the local economy through service contracts	<ul style="list-style-type: none"> <li>• Develop guidance to include in the Procurement Toolkit including examples where how social value has been achieved in other contracts and launch</li> <li>• Develop and launch training to raise awareness for commissioning</li> </ul>	<p>Paul France</p> <p>Paul France</p>	<p>Mar 16</p> <p>June 16</p>	<p>Financial Services Procurement Champions Contract Mgrs</p>	<ul style="list-style-type: none"> <li>▪ Formulating a value for social value delivered</li> <li>▪ Cascading learning and ensuring that social value is considered</li> </ul>	

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	<p>officers</p> <ul style="list-style-type: none"> <li>• Include social value in contract performance monitoring</li> </ul>	Caroline Wood	Sept 16			
12. Improve sustainable and ethical procurement	<ul style="list-style-type: none"> <li>• Develop and embed impact assessments for all procurements valued in excess of £100k</li> </ul>	Caroline Wood	Mar 16		<ul style="list-style-type: none"> <li>▪ Ensuring the Procurement Champions are able to complete assessments</li> </ul>	
	<ul style="list-style-type: none"> <li>• Ethical procurement statement submitted to and approved by CEB</li> </ul>	Caroline Wood	Dec 15	CEB		
	<ul style="list-style-type: none"> <li>• Develop and launch training programme for commissioning officers</li> </ul>	Caroline Wood	Dec 16	Community Services Directorate Housing & Property	<ul style="list-style-type: none"> <li>▪ Ensuring the training is pitched at the correct level and gives sufficient knowledge to apply</li> </ul>	
	<ul style="list-style-type: none"> <li>• Develop new guidance material and identify examples of good practice for inclusion in the Procurement</li> </ul>	Paul France	Dec 16	Community Services Directorate Procurement Champions	<ul style="list-style-type: none"> <li>▪ Keeping it simple but yet effective to enable officers to self-serve</li> </ul>	

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	<p>Toolkit</p> <ul style="list-style-type: none"> <li>• Develop and implement minimum standards and support the revision of the corporate Sustainability Strategy</li> <li>• Review and update ethical procurement statement</li> </ul>	<p>Caroline Wood</p> <p>Caroline Wood</p>	<p>June 16</p> <p>Mar 18</p>	<p>Community Services Directorate Procurement Champions</p> <p>Community Services Directorate</p>	<ul style="list-style-type: none"> <li>▪ Defining appropriate standards which are acceptable across the organisation</li> </ul>	
13. Identifying new ways of delivering the procurement service	<ul style="list-style-type: none"> <li>• Launch of Procurement Toolkit</li> <li>• Deliver the Authorised Procurement Practitioners Programme</li> <li>• Review of eSourcing solutions and making decision for future requirement</li> </ul>	<p>Caroline Wood</p> <p>Nicky Atkin</p> <p>Matt Stevenson</p>	<p>May 15</p> <p>New cohort every 6 months</p> <p>Dec 15</p>	<p>Financial Services Procurement Champions</p> <p>Procurement Champions</p> <p>Procurement Champions</p>	<ul style="list-style-type: none"> <li>▪ Cascading of information to ensure officers know of its existence and how to use</li> <li>▪ Identifying new nominations and officers committing</li> <li>▪ Budgetary pressures may influence decision as to future solution</li> </ul>	100%

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	<ul style="list-style-type: none"> <li>• Revise and update Contract Rules</li> </ul>	Caroline Wood	Dec 15	Law & Governance CMT Council	<ul style="list-style-type: none"> <li>▪ Reaching agreement as to changes required</li> </ul>	
	<ul style="list-style-type: none"> <li>• Procurement Specialists assigned to key Service Areas</li> </ul>	Caroline Wood	Jan 16	Service Areas	<ul style="list-style-type: none"> <li>▪ Only three key Service Areas can be supported with assigned Procurement Specialist</li> </ul>	
	<ul style="list-style-type: none"> <li>• Implement balanced scorecard to monitor the performance of the corporate team</li> </ul>	Caroline Wood	Apr 16	Business Improvement CMT	<ul style="list-style-type: none"> <li>▪ Agreeing a scorecard which is measurable and allows comparison with other procurement teams</li> </ul>	
	<ul style="list-style-type: none"> <li>• Procurement Toolkit review completed and updated where required</li> </ul>	Paul France	Mar 16 and then annually	Procurement Champions		
	<ul style="list-style-type: none"> <li>• Rotate Procurement Specialists across key Service Areas</li> </ul>	Caroline Wood	Jan 17			
	<ul style="list-style-type: none"> <li>• Review and update where necessary</li> </ul>	Caroline Wood	Oct 16, Oct 17	Law & Governance CMT	<ul style="list-style-type: none"> <li>▪ Reaching agreement on changes required across the organisation</li> </ul>	



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	Contract Rules			Council		
14. Improving contract management	<ul style="list-style-type: none"> <li>Exclusion clause inserted into conditions of contract template</li> </ul>	Paul France	Sept 15	Law & Democratic Services	<ul style="list-style-type: none"> <li>Ensuring the staff use the latest version which includes the clause</li> </ul>	
	<ul style="list-style-type: none"> <li>Revised Contract Management Framework approved and launched</li> </ul>	Caroline Wood	Jan 16	OD&CS Board	<ul style="list-style-type: none"> <li>Obtaining approval to implement the Framework</li> </ul>	
	<ul style="list-style-type: none"> <li>Training programme designed and delivered</li> </ul>	Caroline Wood	Mar 16	Procurement Champions Contract Mgrs	<ul style="list-style-type: none"> <li>Ensuring the training is pitched at the right level, officers attending training</li> </ul>	
	<ul style="list-style-type: none"> <li>Contract performance reporting implemented for contracts</li> </ul>	Caroline Wood	Platinum Mar 16 Gold, Silver and Bronze Mar 17	Procurement Champions Contract Mgrs	<ul style="list-style-type: none"> <li>Contract Managers submitting performance data</li> </ul>	
	<ul style="list-style-type: none"> <li>Key contracts identified for renegotiating to deliver 1-3% savings</li> </ul>	Caroline Wood	Apr 16 and then annually	Service Areas Contract Managers Financial Services	<ul style="list-style-type: none"> <li>Reaching agreement on which contracts will be included in exercise and allocation of saving</li> </ul>	
15. Improve the use of P2P	<ul style="list-style-type: none"> <li>Agresso upgrade completed</li> </ul>	Anna Winship	Jan 16	Financial Services Service Areas	<ul style="list-style-type: none"> <li>Successful implementation</li> </ul>	

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	<ul style="list-style-type: none"> <li>• Requisitioners and Approvers reviewed in conjunction with Service Areas</li> </ul>	Nicki Peirce	Dec 15	Service Areas	<ul style="list-style-type: none"> <li>▪ Service Area co-operating with review</li> </ul>	
	<ul style="list-style-type: none"> <li>• Training material and guides updated following upgrade, training plan communicated to Requisitioners and Approvers who are requested to attend</li> </ul>	Caroline Wood	Dec 15	Financial Services Service Areas	<ul style="list-style-type: none"> <li>▪ Successful implementation of upgrade</li> <li>▪ Officers attending training</li> </ul>	
	<ul style="list-style-type: none"> <li>• Regular monitoring reports are distributed to HoS from Agresso</li> </ul>	Caroline Wood	Nov 15 and then monthly	Financial Services Service Areas	<ul style="list-style-type: none"> <li>▪ Performance doesn't improve</li> </ul>	
	<ul style="list-style-type: none"> <li>• Reduction in paper invoices received by working with key suppliers</li> </ul>	Nicki Peirce	Mar 17	Service Areas Suppliers	<ul style="list-style-type: none"> <li>▪ No reduction in paper invoices received</li> </ul>	