

Scotland Excel

To: Executive Sub-Committee

On: 16 February 2024

**Report by:
The Chief Executive of Scotland Excel**

Business Intelligence Strategy and Action Plan

1. Introduction

- 1.1 The purpose of this report is to inform the Executive Sub Committee of Scotland Excel's approach to developing Business Intelligence within the organisation, from 2024 to 2026. The Business Intelligence Strategy and Action Plan have been developed in response to commitments made within Scotland Excel's Corporate Strategy 2023-28 and Operating Plan, approved by the Joint Committee on 8th December 2023.
- 1.2 The Business Intelligence Strategy (Appendix 1) outlines Scotland Excel's vision of, and approach to, maximising the impact of data analysis and reporting to the organisation and its members. The Business Intelligence Action Plan (Appendix 2) outlines the key focus areas for the development of Business Intelligence within Scotland Excel.

2. Background

- 2.1 As a Centre of Procurement Expertise for local government in Scotland, Scotland Excel must adapt to the changing needs of its member organisations and public services. The public sector continues to face an increasingly challenging and complex decision-making environment. Scotland Excel recognises the importance of applying data-driven processes to enhance decision-making and planning to best support member organisations.
- 2.2 With a portfolio of over 70 frameworks and an ongoing commitment to exploring publicly available resources, Scotland Excel has access to a wealth of data that can be applied to better support members in planning and decision making. Development of a Business Intelligence Strategy enables Scotland Excel to increase the sharing of resources with colleagues and members, and develop existing projects such as *Business Intelligence Insight* reporting and the distribution of *Supply Chain Intelligence Reports*.

- 2.3 The development and approval of the Business Intelligence Strategy evidences the commitment of Scotland Excel to continue to develop Business Intelligence services for members, in line with an action contained within the Scotland Excel Operating Plan, approved by the Joint Committee on 8th December 2023. This commitment includes the delivery of the Business Intelligence Action Plan 2024 – 2026.

3. Business Intelligence

- 3.1 Business Intelligence involves transforming data into insights that can be applied to inform decision-making and planning. The sharing of these insights internally and with customers can support Scotland Excel and its members to be proactive to the changing demands within local authorities and the public sector.
- 3.2 The strategy identifies data transformation and data application as key drivers that can increase the impact of data. Data transformation involves processes such as data identification, management, analysis, and sharing. The value of data transformation is increased by data application, in which the data is used to inform decision-making and planning.
- 3.3 The Business Intelligence Strategy will contribute to the delivery of the existing Corporate Strategy (2023 – 2028) by expanding the availability of resources for strategic planning. Upon completion of this Business Intelligence Strategy, the Business Intelligence Team will contribute to the development of the next Corporate Strategy.
- 3.4 The Business Intelligence Strategy will be delivered through the accompanying Action Plan, the progress of which will be reported through the organisational Operating Plan 2023 – 2028. The activities in the Action Plan are aligned to the focus areas of Horizon Scanning, Supply Chain Reporting, Business Intelligence Insights, Strategic Risk, Continuous Improvement, Creating Impactful Intelligence, Intelligent Procurement and Strategic Planning.

4. Recommendation

- 4.1 Members are asked to approve the Scotland Excel Business Intelligence Strategy and Action Plan 2024 – 2026.



Business Intelligence Strategy

Scotland Excel

2024 – 2026

Business Intelligence Strategy
Scotland Excel
2024 – 2026

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Introduction

This 2-year strategy outlines Scotland Excel's reasoning and approach for the introduction and development of Business Intelligence within the organisation.

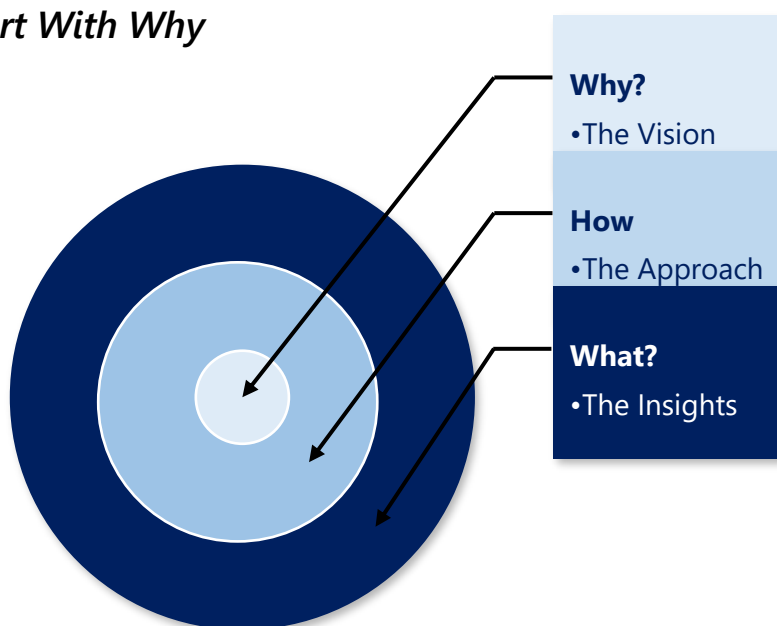
The vision of this strategy is to maximise the impact of the resources and data available to Scotland Excel. The delivery of the Business Intelligence strategy will support Scotland Excel's staff to be equipped with robust data analysis to support and provide enhanced and consistent reporting for members. This will enhance service delivery and both operational and strategic decision making that will contribute to the delivery of the Corporate Strategy 2023-28.

This strategy will run from 2024 to 2026. The technological, social, environmental, economic, and political landscapes will transform over the 2-year course of the strategy. Therefore, it was felt that 2-years was the appropriate period to implement, develop, and review Business Intelligence at Scotland Excel. Upon completion of this 2-year strategy, the Business Intelligence department will be positioned to contribute to the development of Scotland Excel's next Corporate Strategy, the process of which will begin in 2027.

Scotland Excel seeks to become leaders in Business Intelligence, by maximising the impact of data and available resources to best support colleagues, members, and the public sector in Scotland. This strategy has been developed in consultation with thought-leading partners and stakeholders. Achievement of the priorities of the strategy will require collaboration with stakeholders including employees, member organisations, public sector organisations, and academic partners.

This strategy was developed using the "Start With Why" (Sinek, 2019)¹ model shown below. Using this approach, this strategy seeks to effectively communicate the vision, approach, and the anticipated outcomes of its successful delivery.

Figure 1: Start With Why



¹ Sinek, S., 2011. *Start with why: How great leaders inspire everyone to take action*. Penguin.

Context

The public sector faces the most challenging and complex decision-making context in many years. As the centre for procurement expertise for local government, Scotland Excel must adapt to the changing needs of its member organisations and public services.

As explored in *Business Intelligence Insights*² so far, many developments such as changing demographics, energy, technology, and public sector funding are having an evolving impact on the services that Scotland Excel provides, the needs of members, and Scotland Excel's working environment. An in-depth understanding of these issues can provide a detailed picture of Scotland at a national and council level, which will be vital for planning public procurement in the future. These developments present opportunities for Business Intelligence in the local government sector, and at Scotland Excel.

The requirements of public services in Scotland are evolving as local authorities are faced with navigating the cost-of-living crisis, Covid-19 pandemic recovery, supply chain disruption, high energy costs, and an increasing focus on the delivery of carbon net zero emissions. The need to provide best value public goods and services, whilst enhancing social and environmental value is fundamental to the continued support of members.

With a portfolio of over 70 frameworks and by serving the local authorities in Scotland and associate members, there is a wealth of data accessible to Scotland Excel coming from both internal and external sources. Currently, the value of this data is not being unlocked to its full potential. Scotland Excel recognises the value of maximising the impact of this data to both internal and external partners in the planning for and delivery of public services.

To support the development of Business Intelligence at Scotland Excel, a Business Intelligence Team is being developed. The role of the Business Intelligence Team at Scotland Excel will be outlined in this strategy and supplementary action plan. The development and implementation of Business Intelligence in the organisation will facilitate the detection and successful navigation of the evolving expectations of Scotland Excel.

² *Business Intelligence Insights* is Scotland Excel's periodic paper on Business Intelligence and is driven around agreed topics.

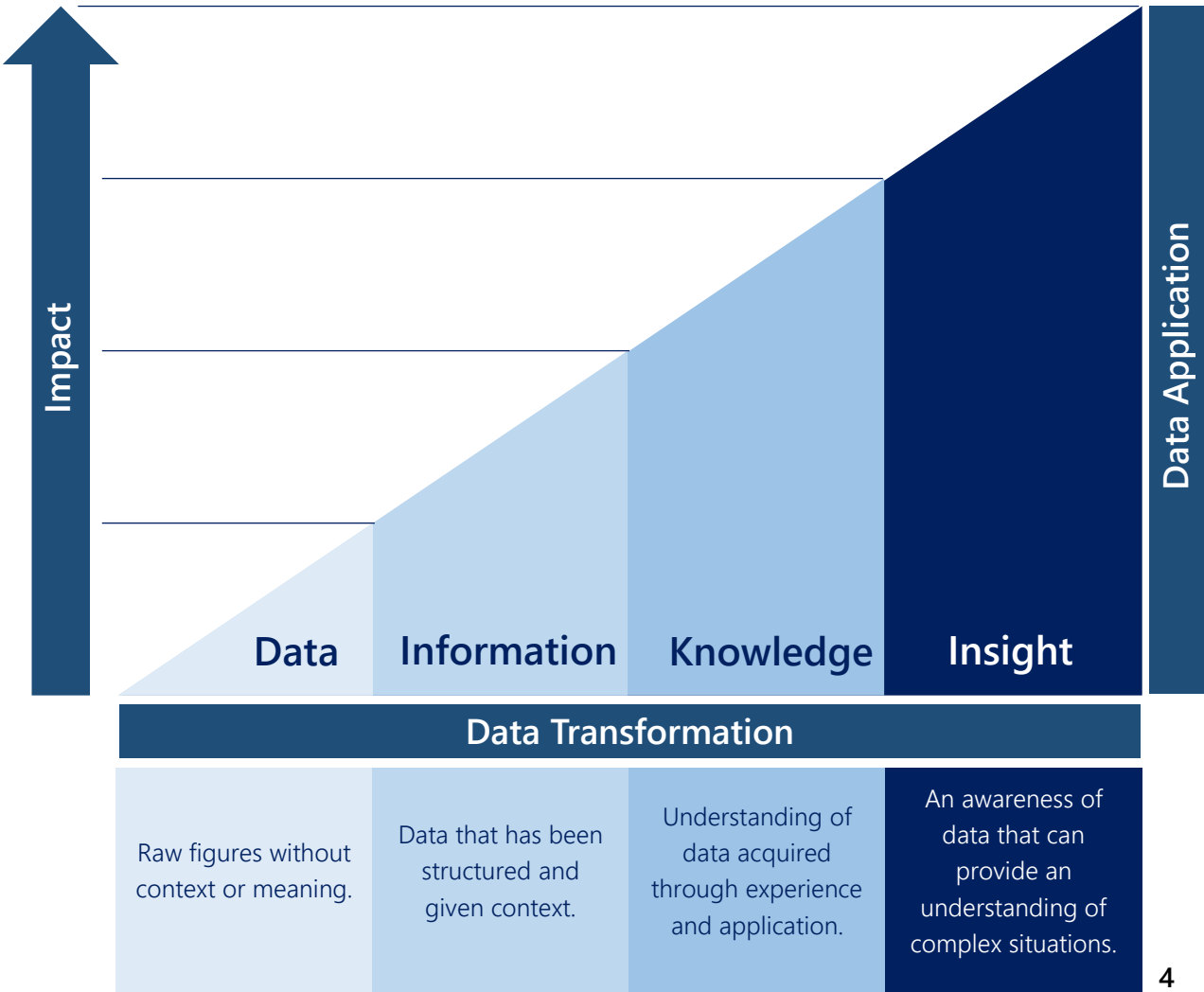
Creating Impactful Intelligence

The model below represents the vision of maximising the impact of data and resources at Scotland Excel. Impact is a measure of the influence or effect of Intelligence on outcomes. Data Transformation is a measure of the understanding of Intelligence, whilst Data Application is the use of the Intelligence to inform decisions. As the understanding of Intelligence grows and it is used to inform work and decision making, its potential influence on outcomes increases.

The phases of data transformation are broken down in the *Creating Impactful Intelligence* model. This model breaks data transformation down into levels, ranging from Data to Insight. As Data evolves along this transformation model, its potential Impact grows. However, application of the Intelligence is required to create Impact. The ambition is to maximise the Impact of Intelligence by transforming it and applying it to better serve members and stakeholders.

One data transformation process that can generate impactful insights is data visualisation. Maps, charts, dashboards, and other data visualisations can support strategic decision making and long-term planning by simplifying complex data, identifying trends and by communicating in-depth insights. For example, the mapping of the energy performance of housing in Scotland can inform the approach taken in reducing housing emissions in Scotland. However, the impact of this data transformation relies on its application by colleagues and stakeholders.

Figure 2: Creating Impactful Intelligence



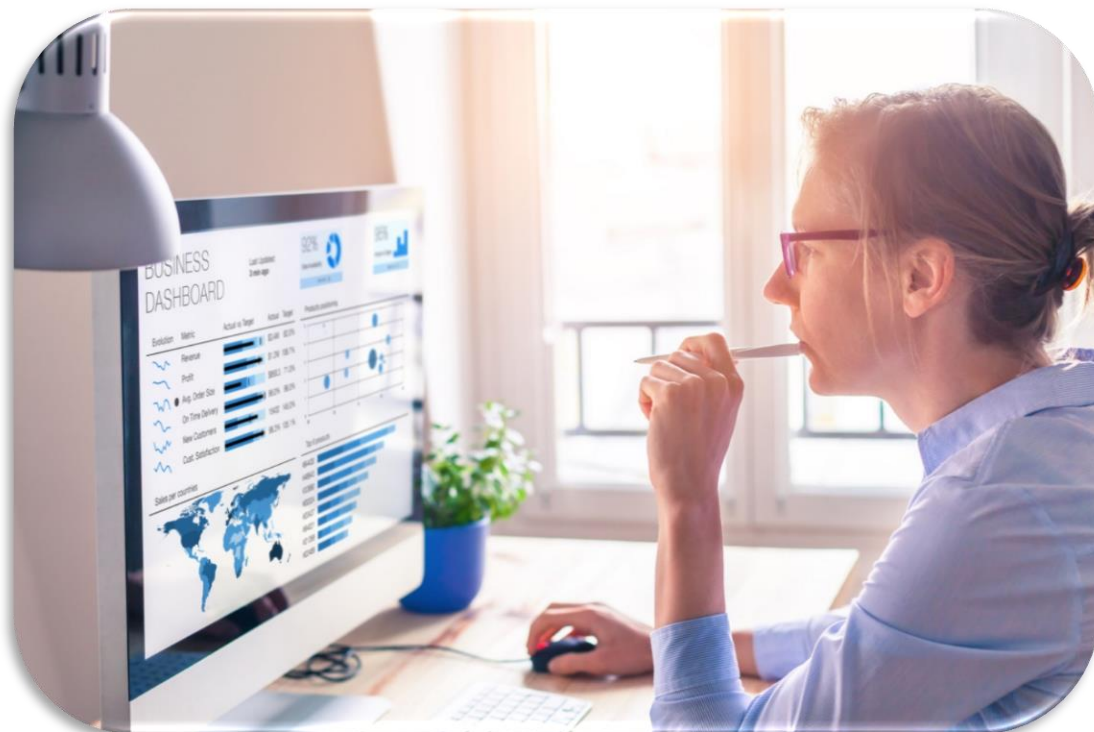
The Vision

The vision of the strategy is to maximise the impact of the resources and data available to the organisation. This will enable deeper knowledge and insights to be obtained and facilitate more insightful reporting both internally and to member organisations and stakeholders.

The availability of internal market intelligence and open data, alongside Business Intelligence platforms such as Microsoft Power BI opens many opportunities to provide insightful data analytics. Upon completion of this strategy, Scotland Excel will be equipped to transform data into insights that inform decision-making for members, and for the wider public sector.

The ambition of Scotland Excel is to be viewed as leaders of Business Intelligence in the public sector. As a Centre of Expertise for Public Sector Procurement, Scotland Excel recognises the importance of collaboration and sharing with partners and member organisations. Scotland Excel will continue to collaborate with other Business Intelligence leaders in the sector.

Although it is the role of Business Intelligence to provide insights, what is fundamental is that these insights spark debate, further consideration, and action. Without application by the relevant stakeholders, the impact of intelligence is diminished. Scotland Excel will explore the application and impact of Intelligence provided to internal and external partners over the course of the strategy.



The Approach

The approach to implementing Business Intelligence at Scotland Excel is outlined in the accompanying Business Intelligence Action Plan. This is the initial plan which will be expanded and managed separately. Activities outlined in the Action Plan are derived from the Operating Plan of the Scotland Excel Corporate Strategy 2023-28.

Successful delivery of this strategy through the agreed Action Plan will enable the Business Intelligence team at Scotland Excel to better inform strategic decision making and planning in the organisation. This will include the development of Scotland Excel's next Corporate Strategy, in addition to the existing Strategic Risk Register and People Strategy.

To maximise the value of data and resources, Scotland Excel must transform its use of resources and data in the organisation. The transformation of data into valuable Business Intelligence will be underpinned by the following principles:

Adapting to Changes

To meet the needs of colleagues, members, and stakeholders.

Innovating and Collaborating

To develop trusted data analytic tools and Business Intelligence processes.

Learning Continuously

To adapt to technological developments and new ways of working.

Ensuring Data Quality

To ensure the relevance, completeness, timeliness, and accuracy of insights.

Managing and Detecting Risk

To monitor movements that may impact delivery of objectives.

Responding to Feedback

To monitor and measure the impact and value of Business Intelligence.

Data Transformation

Business Intelligence involves Data Transformation and creating valuable insights that can encourage action. This requires accessing, collecting, maintaining, analysing, and sharing data. The value of insights derived from data is reliant on factors such as its relevance and timing. Therefore, resources used to inform Business Intelligence have a lifecycle, which is outlined below.

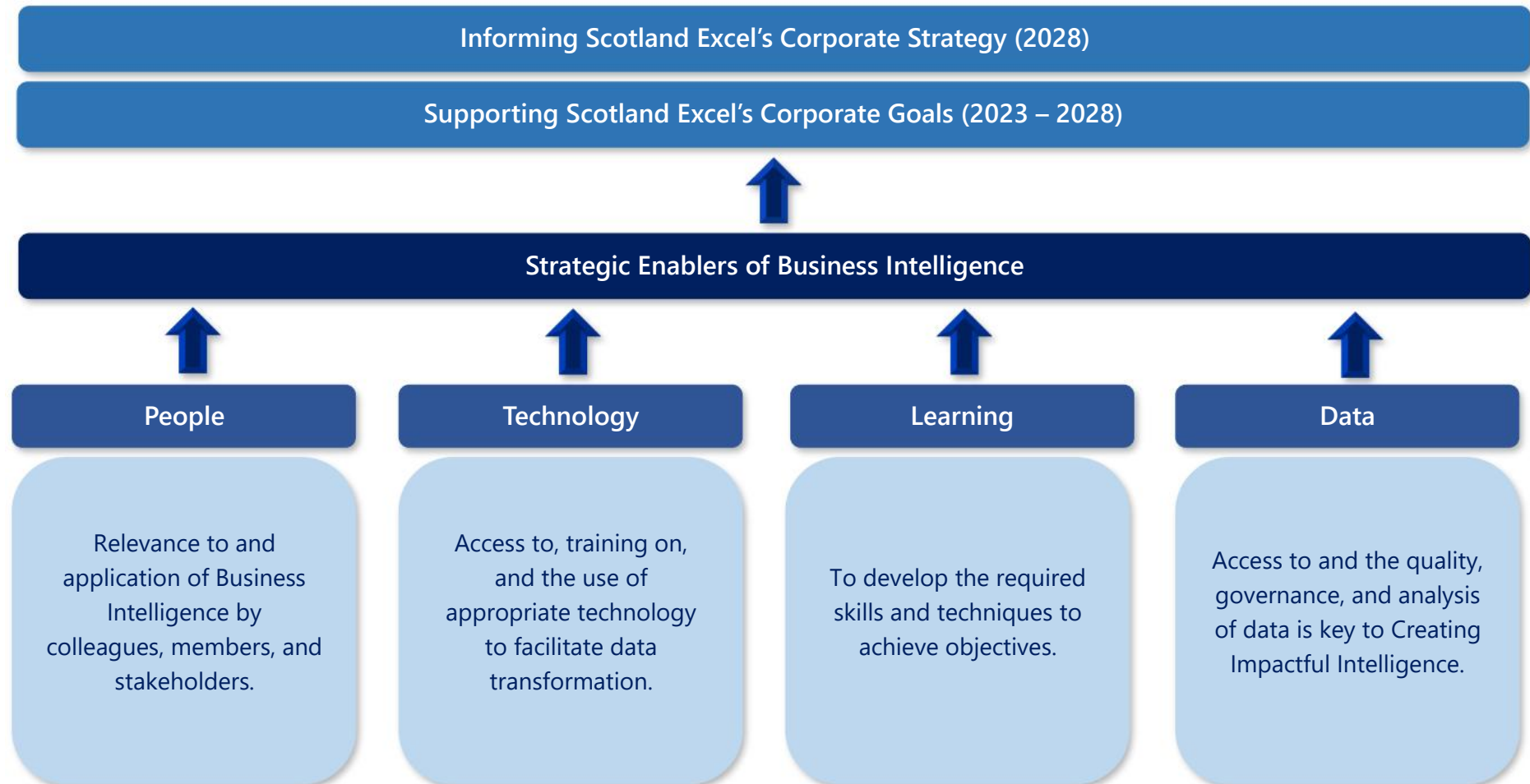
Figure 3: The Business Intelligence Lifecycle



Strategic Enablers

Four strategic enablers contribute to the vision of maximising the impact of data and resources in the organisation.

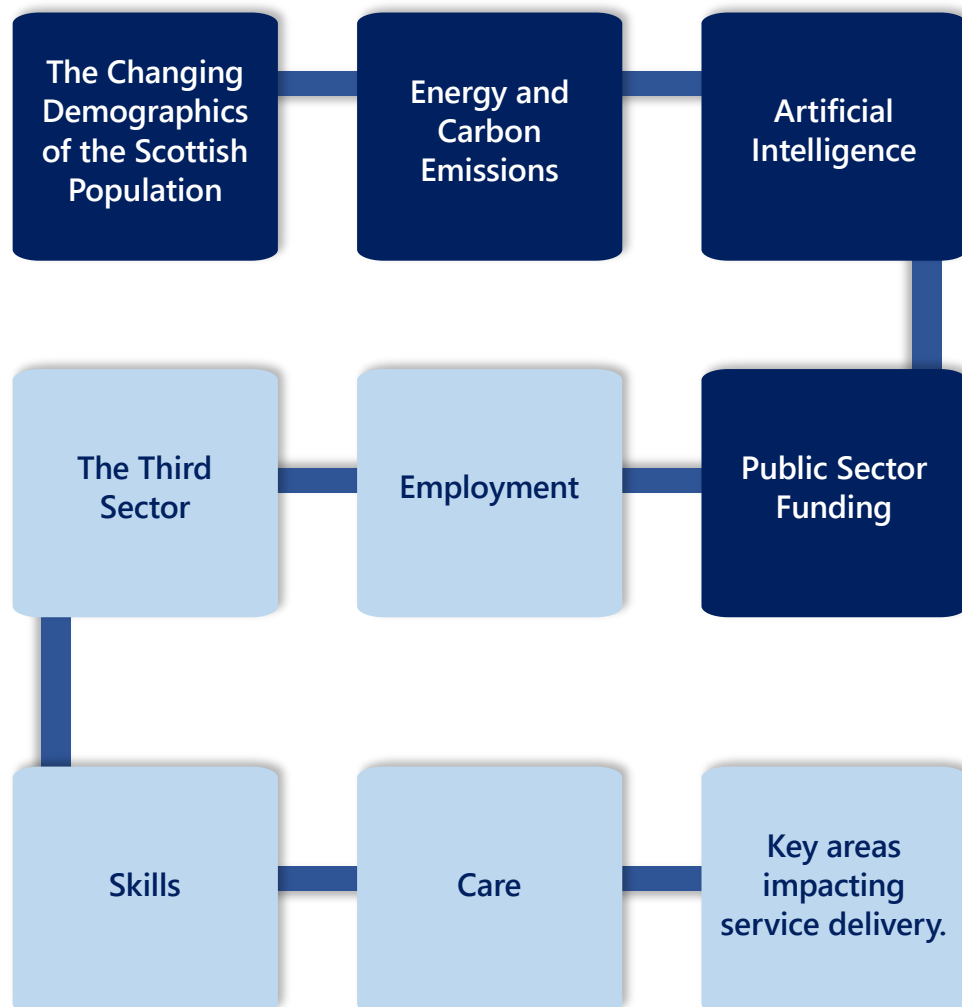
Figure 4: Strategic Enablers



Business Intelligence Insights

Business Intelligence Insights is Scotland Excel's periodic Business Intelligence paper that revolves around issues impacting Scotland Excel and its members, the topics of which are agreed upon and prioritised. These are designed to provoke thought, discussion, and action both internally and externally. Several topics have been covered already and more will follow over the course of the 2-year strategy. The diagram below shows topics that have already been covered, and possible future topics for consideration.

Figure 5: Business Intelligence Insights



Scotland Excel will continue to monitor issues impacting the public sector and will provide timely insights based on developments. The technological, social, environmental, economic, and political landscapes will transform over the 2-year course of the strategy. This will create new challenges and opportunities in the use, analysis, visualisation, and presentation of data. Scotland Excel will continue to monitor developments in this area, and actively seek ways to innovate and improve data processes.



Business Intelligence Strategy

Scotland Excel

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Business Intelligence

Scotland Excel

Action Plan

2024 – 2026

Action Plan

The vision of the Business Intelligence Strategy is to maximise the impact of data and resources to the organisation. This action plan outlines the planned activities for Scotland Excel to achieve this goal. The actions in the action plan are aligned to key areas which are defined below.

| | | |
|---|--|---|
|  | Horizon Scanning | Identification of and planning for potential threats, opportunities, and developments impacting Scotland Excel and its member organisations. |
|  | Supply Chain Reporting | Periodic reporting to support Scotland Excel, its members, and the wider public sector to navigate forthcoming supply chain challenges and opportunities. |
|  | Business Intelligence Insights | Periodic reporting focused on specific topics and to support planning for the potential impacts to Scotland Excel and member organisations. |
|  | Strategic Risk | Organisational strategic risk identification, review, and reporting processes. |
|  | Continuous Improvement | Activities with a key focus on maximising the value of existing resources and developing Business Intelligence at Scotland Excel. |
|  | Creating Impactful Intelligence | Activities with a key focus on data transformation and data application. |
|  | Intelligent Procurement | Identifying opportunities for Business Intelligence resources and processes to support current procurement procedures, and to develop new processes. |
|  | Strategic Planning | Contributing to achievement of Scotland Excel's corporate goals and the development of the future corporate strategy. |

Action Plan Tracker

The action plan below shows the currently planned actions and timeframes for the delivery of the Business Intelligence Strategy. The action plan is dynamic and responsive to developments in the technological and public sector landscape. Therefore, in response to changing circumstances, a flexible and adaptive approach will be taken in managing the action plan. The progress of the Action Plan will be monitored by the Business Intelligence Team and reported through the Scotland Excel Operating Plan.

2024/25

| Area | Action | Timeframe |
|--------------------------------|--|----------------|
| Horizon Scanning | Develop organisational Horizon Scanning Programme to support the organisation to navigate forthcoming changes to market conditions and prioritise opportunities and threats. | Q1 |
| | Host periodic Horizon Scanning sessions to inform strategic decision making and strategic approach to Business Intelligence activities. | Q1-4 |
| Supply Chain Reporting | Distribute Supply Chain Intelligence Report to support Scotland Excel, local authorities, associate members, and the wider public sector to navigate forecasted supply chain challenges. | Q1, Q3 |
| | Provide additional support and resources to members in extraordinary circumstances. | Q1-4 |
| Business Intelligence Insights | Distribute Business Intelligence Insight report and supporting data visualisations. | Q1, Q2, Q3, Q4 |
| | Provide additional support and resources to members in extraordinary circumstances. | Q1-4 |
| Strategic Risk | Review, monitor, and present organisational strategic risk register with engagement from key internal and external stakeholders. | Q1, Q2, Q3, Q4 |
| | Review of organisational strategic risk practices, informed by attendance at risk training sessions and review of risk management resources. | Q4 |
| Continuous Improvement | Ensure continuous engagement and alignment with data initiatives within organisation. | Q1-4 |
| | Explore internal, external, and public sector data landscape, including engagement with Scottish Government's Data Maturity Cohort. | Q3-Q4 |

| | | |
|--|--|--------|
| | Provide specialised training to Business Intelligence team, including relevant data analysis qualifications. | Q1-4 |
| Creating Impactful Intelligence | Expand readership and increase accessibility of resources provided by Business Intelligence at Scotland Excel through various channels. | Q1-4 |
| | Develop the Business Intelligence portal within the customer-facing IT infrastructure. | Q2 |
| | Host Business Intelligence workshops to support colleagues and members to apply insights to strategic planning and decision making. | Q2, Q4 |
| Intelligent Procurement | Collaborate with Procurement and Savings Team colleagues, and members, to develop resources that can support planning and decision making. | Q2-3 |
| | Support Scotland Excel's Savings Team to identify and prioritise savings opportunities and to present and apply savings data. | Q2-3 |
| | Collaborate with Procurement colleagues to integrate data from procurement sources into Business Intelligence processes and insight development. | Q3-4 |
| | Integrate Business Intelligence support in procurement processes, such as informing framework development and User Intelligence Group preparation. | Q4 |
| | Periodic and continuous consultation with stakeholders to ensure resource requirements are being met, and to support enhanced use of data. | Q1-4 |

2025/26

| Area | Action | Phase |
|---------------------------------|--|----------------|
| Horizon Scanning | Host periodic Horizon Scanning sessions to inform strategic decision making and strategic approach to Business Intelligence activities. | Q1-4 |
| Supply Chain Reporting | Distribute Supply Chain Intelligence Report to support Scotland Excel, local authorities, associate members, and the wider public sector to navigate forecasted supply chain challenges. | Q1, Q3 |
| | Provide additional support and resources to members in extraordinary circumstances. | Q1-4 |
| Business Intelligence Insights | Distribute Business Intelligence Insight report and supporting data visualisations. | Q1, Q2, Q3, Q4 |
| | Provide additional support and resources to members in extraordinary circumstances. | Q1-4 |
| Strategic Risk | Review, monitor, and present organisational strategic risk register with engagement from key internal and external stakeholders. | Q1, Q2, Q3, Q4 |
| | Develop organisational Strategic Risk Improvement Plan, to foster enhanced risk monitoring and mitigation throughout organisation. | Q2 |
| | Implement Strategic Risk Improvement Plan. | Q3-Q4 |
| Continuous Improvement | Explore internal, external, and public sector data landscape, including engagement with Scottish Government's Data Maturity Cohort. | Q1-2 |
| | Implement learnings from Scottish Government's Data Maturity Cohort. | Q3-4 |
| | Provide specialised training to Business Intelligence team, including relevant data analysis qualifications. | Q1-4 |
| Creating Impactful Intelligence | Continue to expand readership and increase accessibility of resources provided by Business Intelligence at Scotland Excel through various channels. | Q1-4 |
| | Develop and implement a method of measuring and assessing the impact of Business Intelligence resources to the organisation, members, and stakeholders. | Q2 |
| | Host Business Intelligence workshop to support colleagues and members to apply insights to strategic planning and decision making. | Q2, Q4 |

| | | |
|--------------------------------|--|------|
| Intelligent Procurement | Collaborate with Procurement and Savings Team colleagues, and members, to develop resources that can support planning and decision making. | Q1-4 |
| | Support Scotland Excel's Savings Team identify and prioritise savings opportunities and to present and apply savings data. | Q1-4 |
| | Periodic and continuous consultation with stakeholders to ensure resource requirements are being met, and to support enhanced use of data. | Q1-4 |
| Strategic Planning | Review of lessons learned from first Business Intelligence Strategy and identification areas for further development. | Q3-4 |
| | Develop next Business Intelligence Strategy that will contribute to the creation and delivery of the next organisational corporate strategy. | Q4 |

