

Scotland Excel

To: Executive Sub Committee

On: 13 May 2016

Report
by
Director Scotland Excel

Operating Plan Update 2015/16
Operating Plan 2016/17

1. Purpose of the report

In June 2015, Scotland Excel's Joint Committee approved a new three year strategy and rolling annual operating plan. This report provides an update on projects and activities undertaken by the organisation in 2015 -16 and provides a draft of the 2016-17 operating plan that will be presented to the Joint Committee in June.

2. Planning methodology

The rolling annual operating plan records the high level activities and commitments that will be delivered to achieve our four strategic goals:



The operating plan is used to set annual priorities and detailed performance objectives for the organisation and employees. A review of progress made against these priorities and objectives is undertaken in April each year, and the operating plan is updated to ensure that it remains closely aligned with the goals of the three year strategy and to respond to any changes in the external environment.

Appendix 2 provides a draft of the updated operating plan for 2016-17 which outlines the high level activities and commitments for second year of strategy

delivery. Scotland Excel's Performance Review and Development (PRD) programme for staff is underway to assess their performance against assigned objectives in 2015-16, and cascade new objectives for delivering the priorities identified for 2016-17.

3. Monitoring and reporting

From April 2016, reports on progress against the activities in the operating plan will be produced at the end of each quarter and submitted to the Executive Sub-Committee at the next scheduled meeting. These will take the format of the report in Appendix 2 which covers progress made by Scotland Excel during the full year of 2015-16.

4. Recommendation

The members of the Executive Sub-Committee are invited to note the approach being taken by Scotland Excel to update the operating plan, and the progress made by Scotland Excel in delivering its corporate strategy.



Operating Plan

2015 – 2016

Year End Report

Goa1 1: Supporting the delivery of better and more effective public services

Strategic objectives	
1.1	Deliver a range of collaborative procurement and supplier development services which support customers at a strategic and operational level
1.2	Deliver a range of shared services which support customers in the development of their professional, organisational and commercial capability
1.3	Deliver a range of new shared services which support the effectiveness and efficiency of customer operations

Activity	Year 1 Priorities	RAG status	Progress summary
(a) Develop and implement a contract plan aligned to the strategic priorities of member authorities	- Update rolling contract delivery plan for joint committee approval - Develop a flexible workforce model to resource the contract delivery plan - Hold biannual Commercial UIGs and interim steering group meetings - Develop category strategies for all key category areas	G	- An updated contract delivery plan which extends to March 2017 was presented to the joint committee in November. Alternative delivery options to enable further expansion of the portfolio are being explored; these include contract rationalisation, new funding models and cross sector partnership working. - A flexible workforce model has been developed to resource the current contract delivery plan. A resource planner is updated monthly to reallocated resources where required. - Commercial UIGs were held for all councils in June and December to review the contract delivery plan. The smaller steering group of members also met in April, August, October, November and January to provide ongoing input to plans. - Category strategies have been completed for all key category areas to set the direction for future contract development and management.

(b) Develop and implement a strategy and plan for the delivery of contract and supplier management	- Review CSM strategy, methodology and systems - Produce regular reports on contract performance		- A project was initiated in November to review all aspects of the existing CSM programme. The project team has been evaluating a performance management module (eSPM) which is available as part of national collaborative eCommerce tools. A pilot is being planned for 2016-17. - Annual contract management reports analysing a range of market and business data are produced for all contracts. These are discussed with managers/peers to agree opportunities for continuous improvement.
(c) Develop and implement a strategy and plan for improving supplier performance	Launch Supplier Excellence Award programme		The Supplier Excellence Awards were held in Glasgow in June, with awards presented to 11 suppliers across 7 categories. The ceremony formed part of a high profile event organised in partnership with the Supplier Development Programme (SDP), and attended by 39 public sector exhibitors and 700 suppliers. Plans will be developed during 2016-17 for the future direction and frequency of the awards programme.
(d) Manage the rollout of a new national procurement capability assessment to the local government sector	- Identify and train PCIP assessors - Develop and implement PCIP workshops and training for councils - Agree assessment schedule and complete assessments in line with the schedule		- Four members of staff have been trained to undertake Procurement Capability Improvement Programme (PCIP) assessments. Assessors have been selected from teams across the organisation to create a mix of procurement, stakeholder and change management experience. - Six workshops took place throughout Scotland between August and October to help local authorities prepare for the new assessments. - Seven local authorities took part in mock assessments during November. The findings from this exercise have been shared with all councils. - Following consultation with councils, it was agreed that PCIP assessments would be delayed until May – October 2016 to allow further time for preparation. However, some councils have elected not to participate in the assessments this year due to other business priorities.

(e) Develop and implement a programme to lead and support the development of procurement and commercial capability	- Secure funding to support the continued delivery of capability and change services - Develop and deliver a programme of capability and change services agreed with councils		- Scotland Excel secured additional funding to continue the delivery of reform activity in 2016-17 at the joint committee in November. - A number of ad hoc services were delivered during 2015-16 including support for local transformation programmes, assessments to identify additional savings opportunity, and 'critical friend' workshops. - A Procurement Improvement Programme (PIP) steering group has been re-established to plan priorities for this programme. The group met in February to agree priorities and will meet again in May to finalise proposals for a new programme.
(f) Develop and implement a 'procurement academy' to support professional capability and encourage new entrants to public procurement	- Develop a model for the future delivery of learning and development services in line with council requirements - Develop a strategy for implementing eLearning capability		Initial 'procurement academy' proposals centred on a Masters qualification were ruled out by councils due to cost. Further research took place in March to identify requirements. eLearning was confirmed as a key priority, and a model has been developed around resources available from professional organisations. This will be piloted during Q1 of 2016-17 and the findings used to inform plans for roll out to the sector. Requirements for a professional development qualification and modern apprenticeship support will be explored during this second phase.
(g) Develop and implement a shared service offering for councils which meets their requirements in a changing public sector landscape	Develop a shared services strategy aligned to customer requirements		Consultation with stakeholders as part of funding proposals identified limited appetite for additional shared services at the present time. This will be revisited as part of Year 2-3 plans with a view to helping local authorities create efficiencies and progress their shared service goals.

Goal 2: Being sustainable in everything we do

Strategic objectives	
2.1	Work with stakeholders to develop procurement strategies which support the delivery of national and local policy priorities
2.2	Deliver positive and measurable social, economic and environmental impact to local communities
2.3	Lead and support customers in the development and implementation of best practice in sustainable procurement

Activity	Year 1 Priorities	RAG status	Progress summary
(a) Develop and implement strategies for responding to procurement and/or public sector legislation	- Develop and implement an action plan for complying with legislative changes - Assess the procurement impact of the community empowerment bill - Develop an action plan to support health and social care integration (HSCI) - Develop a waste category strategy which continues to support compliance with environmental legislation		- Scotland Excel supported the Scottish Government with developing statutory guidance on sustainable procurement through the Public Procurement Policy Forum. All staff have been trained on new legislative obligations and a plan to ensure compliance is being implemented. - Assessment of the Community Empowerment (Scotland) Act suggests it is unlikely to have an immediate impact on Scotland Excel, although there may be implications for procurement at local level. A watching brief will be maintained in 2016-17, and support provided to councils as required. - Scotland Excel held a successful HSCI stakeholder event with NSS National Procurement in June. An action plan has been created in partnership with NSS and an engagement plan for IJBs is in development. - The waste category strategy has been completed and Scotland Excel is continuing to manage contracts which support councils with their waste management obligations. A category forum will take place with stakeholders in June.
(b) Ensure Scotland Excel's collaborative frameworks support local and national government policy priorities	- Develop a strategy for incorporating workforce matters in contracts - Develop monitoring and reporting capability for suppliers' workforce policies - Achieve Living Wage accreditation - Develop a social care		- Scotland Excel supported the Scottish Government with developing statutory guidance material on workforce matters, and has considered within all tenders since the requirement came into effect in November. - Supplier policies on payment of the Living Wage are reported within contract award recommendations and monitored alongside community benefit commitments. - Scotland Excel achieved Living Wage accreditation in December in support of national policy. - The social care category strategy has been completed. The care homes

	category strategy which continues to support outcomes focused delivery		for adults with learning disabilities framework awarded in June was developed around the national Keys to Life policy. Enhanced contract management services are now being provided to a number of councils to support the National Care Home Contract.
	Roll out sector deliverables from the National Construction review		Scotland Excel is continuing to participate in the Construction Review Delivery Group and communicate outcomes to the sector. Workshops are being considered to support roll out to the sector in 2016-17.
(c) Ensure Scotland Excel's collaborative frameworks support positive local economic outcomes	- Implement measures to review and monitor local impact within strategy development and ongoing contract management - Embed data collection and reporting processes for community benefits - Pilot a local project to encourage SME participation in national contracts		- Local impact is considered as part of all contract strategy development. Recent initiatives have included the development of opportunities for local producers in food contracts, and for third sector and supported businesses in furniture contracts. - Scotland Excel is continuing to incorporate community benefits into all relevant contracts, and data is collected and reported on a six monthly basis. Enhancements to data collection and reporting processes will be considered in 2016-17. - Scotland Excel's customer account managers provide quarterly reports to councils on local suppliers and community benefits. A pilot project with Comhairle nan Eilean Siar modelled an approach for working directly with councils to support SMEs, and consideration will be given to extending this to other councils in 2016-17.
(d) Ensure Scotland Excel's collaborative frameworks support local government environmental duties and policies	Continue to support local authority compliance with climate change targets and efforts to recover value from waste		Scotland Excel is continuing to support the Scottish Government and Zero Waste Scotland with plans to create a National Brokerage to recover greater value from waste across the public sector.

(e) Champion the development and dissemination of best practice in sustainable procurement	• Develop a sustainable procurement strategy to guide practice across the sector • Continue to work with partners to develop, deliver and promote sustainable procurement tools • Develop an action plan to support stakeholders in meeting obligations from new procurement legislation		• Scotland Excel's focus during 2015-16 has been supporting the development of statutory guidance on sustainable procurement. A strategy will be developed during 2016-17 to provide practical guidance on all aspects of sustainable procurement. • Scotland Excel is continuing to participate in Scottish Government's policy and best practice working groups, and has supported updates to the Sustainability Prioritisation Tool and Flexible Framework to reflect legislative changes. • Scotland Excel supported the sector roll out of national training and e-learning tools for legislative changes, and will assess further support required by the sector in 2016-17.
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Goa1 3: Placing customers at the heart of our business

Strategic objectives	
3.1	Work with customers to develop and implement bespoke plans for maximising the value of our services
3.2	Develop robust communications strategies which support customer engagement and position Scotland Excel and its customers as leaders in public procurement / shared services
3.3	Represent the views and needs of customers in the wider stakeholder environment

Activity	Year 1 Priorities	RAG status	Progress summary
(a) Develop and implement a portfolio of account management services that meet the collective and individual needs of local authority customers	- Develop account management plans for each council and deliver services in line with plans - Develop a programme of events in line with customer expectations - Develop and deliver a suite of business information reports in line with customer needs		- An account planning methodology has been agreed under the guidance of a new Customer Development Manager appointed in February. Plans are being drafted for each council and will take effect from 2016-17. - A number of seminars and workshops for procurement stakeholders have taken place during 2015-16, with themes including workforce matters, community benefits, health and social care integration and the European Single Procurement Document (ESPD). A programme of events for 2016-17 is being developed in consultation with customers. - Ongoing improvements have been made to the content of quarterly account management reports as a result of customer feedback, and will continue into 2016-17.
(b) Develop and implement a stakeholder engagement strategy that support the delivery of first class customer experience across all of our services	- Complete stakeholder mapping and report - Develop a stakeholder engagement strategy - Deliver a project to improve all aspects of stakeholder engagement and customer experience		- Stakeholder mapping has been completed across the organisation to benchmark the strength of relationships, understand how teams engage with their stakeholders, and develop value propositions. The findings have informed the stakeholder engagement project and a report will be produced by July 2016. - A stakeholder engagement strategy encompassing all relationships and customer service activities will be completed by July 2016 - The stakeholder engagement project is progressing well. Due to the size and complexity of the project, the work has been split into eight sub-projects looking at customer principles, senior stakeholders, stakeholder landscape, event management, web refresh, account management, CRM and collaborative tools.

(c) Develop and implement a corporate communications strategy that enhances and protects Scotland Excel's corporate reputation	• Develop a marketing and communications strategy and plan • Complete and launch a refreshed Scotland Excel's web presence • Monitor and manage all communications risks arising from Scotland Excel contracts/ activities		• A marketing and communications strategy and rolling plan has been developed, incorporating an increased focus on raising corporate profile through media relations and public affairs. A specialist media and communications officer will join the team in May 2016. • Development of the Scotland Excel website will be completed by the end of May and will be re-launched in early June. Initial timescales for redevelopment were extended into 2016-17 to incorporate a number of additional enhancements in response to customer feedback. • Scotland Excel is continuing to mitigate communication risks through meticulous handling of media enquiries in line with policy.
(d) Develop and implement a model for associate members which delivers clear business and financial benefits to Scotland Excel and the membership base	• Review and segment the associate member customer base to develop a tiered membership offering • Develop a strategy to support recruitment and retention of associate members		• A segmented charging model for associate members has been developed based on contract usage. Entry level fees now begin at £500 and rise in line with the value obtained by members. All contract information is now accessible through the Scotland Excel website and the national Catalogue Content Management (CCM) system. • Pilot initiatives to support recruitment have included a mailing campaign, attendance at the Chartered Institute of Housing Scotland Conference in Edinburgh on 1-2 March, and seven procurement capability assessments funded by the Scottish Government. There is stiff competition in this sector from other procurement organisations including Procurement for Housing and Scottish Procurement Alliance. However, Scotland Excel has secured the country's largest social landlord, the Wheatley Group, as an associate member. A strategy is in development to support further recruitment efforts in 2016-17.
(e) Develop and implement a programme for engaging with the wider public sector to ensure Scotland Excel has the right partnerships in place to support the needs of its customers	• Establish forums to gather sector views and share information • Represent sector views within the national public procurement programme • Map the wider stakeholder landscape and develop engagement plans		• Scotland Excel hosts steering group meetings with council procurement representatives for contract delivery, procurement reform and learning and development. Executive Team members rotate attendance at the Scottish Local Government Procurement Forum (SLGPF). Regular stakeholder workshops take place to discuss key procurement issues. • Scotland Excel continues to represent the sector in all key national procurement forums. Regular meetings take place with Centre of Expertise partners to explore opportunities for cross-sector working. • The wider stakeholder landscape been mapped and responsibility for developing engagement plans and managing relationships with key organisations has been assigned. All plans will be completed by May and reviewed quarterly by the Senior Management Team.

Goal 1 4: Becoming the partner of choice for delivering shared services

Strategic objectives	
4.1	Implement organisational development policies which support a highly skilled, motivated and engaged workforce
4.2	Implement best practice processes and technology which support the efficient and effective delivery of services to customers
4.3	Implement robust strategies, governance, risk management and funding models which demonstrate a measurable return on investment and secure Scotland Excel's future

Activity	Year 1 Priorities	RAG status	Progress summary
(a) Develop and implement a strategy to support staff recruitment, retention, development, performance and engagement	- Develop a rolling resource plan to support all business areas and activities - Develop a recruitment strategy including a review of the careers microsite		- A rolling resource plan is in place for the strategic procurement function. The model will be adapted for other areas of the organisation during 2016-17. - A recruitment strategy is in development and Scotland Excel's careers microsite will be refreshed following the launch of the new corporate website.
(b) Develop and implement programmes to support the continuous improvement of business performance, systems and processes	- Deliver Scotland Excel's transformation programme in line with agreed plans - Develop an ICT strategy and implement plans for key development priorities - Develop proposals for the future of Scotland Excel's ICT infrastructure		- Progress has been made across the six projects within Scotland Excel's transformation programme. A review is being undertaken to determine the shape and priorities for the programme in Year 2. - The ICT strategy was completed in December. Key development priorities were agreed as being the website and spend data management and reporting tools. The website is scheduled for completion by the end of May, and a requirements specification for data management is in progress. - Technology company SCC have been engaged to develop infrastructure proposals based on an analysis of ICT requirements across the organisation. Their report is expected in April and will include estimated migration and operational costs.

(c) Ensure that Scotland Excel delivers its plans through effective governance, risk management and policies	• Review Scotland Excel's governance arrangements • Implement and embed new risk management methodology • Develop a rolling plan for reviewing policies and processes • Agree a methodology for quarterly performance reporting		• Scotland Excel is reviewing governance arrangements with legal colleagues from Renfrewshire Council. Terms of reference for the Chief Executive Officers Management Group (CEOMG) are being updated and action is being taken to revitalise membership of this group. • Risks are being monitored, managed and reported in line with the new methodology. At the request of joint committee members, reports will now show variance in risk assessments due to mitigations put in place by Scotland Excel. • A full review of contract policies, procedures and documentation has been completed as part of the governance project within the transformation programme. A review of key policies for absence management and flexitime has been completed and a plan for reviewing other corporate/HR policies has been developed. • A quarterly performance reporting methodology and template has been developed and will take full effect from April 2016.
(d) Develop and implement a strategy for gathering, analysing and distributing business intelligence within Scotland Excel and across the sector	• Review existing resources and develop a plan and systems requirements for managing data, information and intelligence • Develop an enhanced MI strategy to support the expansion of the contract portfolio		• A review of data, information and intelligence resources has been completed as part of the business intelligence project within the transformation programme. Systems requirements for data management and reporting tools are being developed as an ICT priority project. • An agreement with Keynote has been established to provide participating councils with access to market reports. The opportunity to provide more extensive business intelligence services for councils will be investigated in 2016-17.
(e) Develop and implement a clear, transparent and sustainable funding and delivery model for Scotland Excel	• Develop a sustainable funding model for Scotland Excel		• Additional funding was agreed by the Joint Committee for the delivery of Reform and Learning and Development services. • Further work is required to develop a funding model which supports support long term sustainability including investigation of chargeable services, rebates, supplier levies and/or expansion of the associate member base.

Report Key	
	Project or activity is currently stalled or significantly behind schedule
	Project or activity is progressing at a slower pace than anticipated and/or results have been weaker than expected
	Project or activity has been completed and/or is progressing in line with expected/agreed timelines and targets



Operating Plan

01 April 2016 – 31 March 2017

Introduction

Scotland Excel is the Centre of Procurement Expertise for the local government sector. Established in 2008, we deliver shared services for collaborative procurement, and lead initiatives to increase procurement capability across the sector through learning and development, consultancy and the development of methodologies, tools and guidance to support good practice.

Our contracts and services aim to increase efficiency and ensure money is saved to protect front line public services. Our strategic approach to procurement has supported innovation in service delivery, helped to deliver national and local policies, and brought wider economic, environmental and social benefits to communities through sustainable procurement and supplier development.

In 2015, we published a new three year corporate strategy to underpin the next phase of growth for our organisation, and ensure our long term sustainability as a successful local government shared service. The strategy has been designed to meet current and future requirements of local authorities identified through extensive stakeholder engagement, consultation and research.

Our vision is to be the shared service partner of choice for the local government sector by ensuring that everything we do delivers value to our customers and their communities. The strategy map on page 3 provides an overview of our business goals and strategic objectives, and the full strategy document is available to download from our website.

To support the strategy, we have developed a rolling annual operating plan to record the high level activities and commitments we will deliver to achieve our business goals. The plan is used to guide detailed action plans for the organisation and set annual performance objectives for employees.

This is second iteration of the plan and changes reflect the progress that has been made in 2015-16 and the priorities we have identified for the coming year. An annual report against key priorities for the first year provides further detail and can be used to track the evolution of the operating plan.

The operational plan will continue to be reviewed and updated annually to reflect progress against our commitments and respond to any changes in the external environment. We will also continue to assess how well we have achieved the eight outcomes identified in the strategy map and take any action required to ensure our strategy remains on track.

Strategy Map

Vision

To be the shared service partner of choice for the Local Government sector

Mission

To deliver **effective** and **customer-orientated** shared services which support **collaborative, innovative** and **sustainable** public services, add **measurable value** for our customers, and bring **tangible benefits** for local communities and service users.

Values

Professional • Courageous • Respectful • Integrity

Outcomes

Our services support the effective and efficient delivery of public services	Our services support the implementation of national and local policy priorities	Our customers receive relevant communication and support	Our people, policies, processes and technology optimise our value
Our expertise supports continuous improvement in our sector's procurement performance	Our services help to deliver positive and sustainable outcomes for communities and service users	Our reputation demonstrates the value of collaboration	Our customers are satisfied with our services and achieve a measurable return on their investment

Goals

1: Supporting the delivery of better and more effective public services Strategic objectives: 1.1 Deliver a range of collaborative procurement and supplier development services which support customers at a strategic and operational level 1.2 Deliver a range of shared services which support customers in the development of their professional, organisational and commercial capability 1.3 Deliver a range of new shared services which support the effectiveness and efficiency of customer operations	2: Being sustainable in everything we do Strategic objectives: 2.1 Work with stakeholders to develop procurement strategies which support the delivery of national and local policy priorities 2.2 Deliver positive and measurable social, economic and environmental impact to local communities 2.3 Lead and support customers in the development and implementation of best practice in sustainable procurement	3: Placing customers at the heart of our business Strategic objectives: 3.1 Work with customers to develop and implement bespoke plans for maximising the value of our services 3.2 Develop robust communications strategies which support customer engagement and position Scotland Excel and its customers as leaders in public procurement /shared services 3.3 Represent the views and needs of customers in the wider stakeholder environment	4: Becoming the partner of choice for delivering shared services Strategic objectives: 4.1 Implement organisational development policies which support a highly skilled, motivated and engaged workforce 4.2 Implement best practice processes and technology which support the efficient and effective delivery of services to customers 4.3 Implement robust strategies, governance, risk management and funding models which demonstrate a measurable return on investment to customers and secure Scotland Excel's future
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Progress against outcomes

During 2015-16, our activities achieved the following outcomes. A more detailed report on our progress during 2015-16 is published on our website, along with case studies outlining the impact of our work.

Our services support the effective and efficient delivery of public services • New contracts delivered for care homes for adults with learning difficulties and buildings related engineering consultancy • Health and social care event held to explore opportunities to provide procurement support to Integrated Joint Boards (IJBs) • Enhanced procurement and contract management provided for the National Care Home Contract	Our expertise supports continuous improvement in procurement performance • 42 training courses delivered to 526 delegates as part of the Enhancing Procurement Capabilities programme • Practitioner workshops held on workforce matters, community benefits, and the European Single Procurement Document • Support provided for local authority procurement transformation programmes
Our services support the implementation of national and local policy priorities • Care home for adults contract developed in line with the national 'Keys to Life' policy • Groceries tender included local produce options to support Scottish SMEs and the national Dairy Action Plan • All suppliers encouraged to pay the Living Wage, and workforce matters scored in tenders where appropriate	Our services help to deliver positive and sustainable outcomes for communities and service users • Community benefits delivered 32 apprenticeships, 12 jobs and 7,515 hours of work experience • £400m spend with Scottish-based suppliers, of which 65% is with SMEs • Community meals contact supports independent living and involved service users in the evaluation
Our customers receive relevant communication and support • Scotland Excel News launched to provide regular updates to all stakeholders • Category newsletters re-launched to provide contract updates for procurement and technical stakeholders • Website refresh includes an enhanced contract directory in response to customer feedback	Our reputation demonstrates the value of collaboration • 22 print and online news stories generated by press releases • Scotland Excel staff invited to speak at 11 events and conferences • Winner of 3 categories at the GO Awards (Scotland), and of the National GO Award for Initiative or Innovation of the Year

Our people, policies, processes and technology optimise our value • Transformation programme initiated to support improvement in six key business areas • Contract and supplier management programme reviewed to increase efficiency and improve reporting • ICT infrastructure review initiated to ensure optimum technology platform for business efficiency	Our customers are satisfied with our services and achieve a measurable return on their investment • Estimated savings of £15.5m achieved in 2015, representing a return of £5 for every £1 invested in Scotland Excel • Pilot opportunity assessments with 7 councils have identified up to £6m additional savings potential • Review of account management services and reports initiated to improve value to councils
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Priorities for 2016-17

Summary of the key activities and commitments we have identified for this year:

Goa1 1: Supporting the delivery of better and more effective public services • Continue to implement the contract delivery plan to March 2017 and pursue options for extending the plan beyond this date • Pilot and roll out a new approach to Contract and Supplier Management (CSM) • Deliver an integrated programme of supplier development activity including future plans for the Supplier Excellence Awards • Complete the first cycle of national Procurement and Commercial Improvement Programme (PCIP) assessments • Implement a refreshed procurement capability programme aligned to council development needs • Deliver a new learning and development strategy including the roll out of eLearning capability • Develop a strategy for encouraging and supporting new entrants to procurement • Investigate new shared service offerings which provide further efficiencies for members	Goa1 2: Being sustainable in everything we do • Continue to implement plans to provide procurement support for Integrated Joint Boards (health and social care) • Continue to provide participating councils with procurement and contract management support for the National Care Home Contract • Develop plans to support the delivery of frameworks for adult supported living and care at home • Continue to support national and local policy initiatives through procurement • Develop a strategy for engaging with supported businesses • Develop enhanced monitoring and reporting for community benefits and local economic impact • Continue to support local government environmental duties and policies • Develop a sustainable procurement strategy and continue to support councils with sustainable procurement practice
Goa1 3: Placing customers at the heart of our business • Continue to implement a refreshed portfolio of personalised account management services for local authorities • Complete and embed the stakeholder engagement strategy to ensure customers are at the centre of all business activity • Launch and manage the refreshed Scotland Excel website as the organisation's key source of corporate and contract information • Increase the profile of Scotland Excel and our stakeholders through a programme of marketing and communications activity • Develop and implement a strategy for the recruitment and retention of associate members • Continue to develop and strengthen relationships with external stakeholders to represent and champion the views of our sector	Goa1 4: Becoming the partner of choice for delivering shared services • Develop and deliver an organisational development strategy to support staff recruitment, retention, performance and engagement • Continue to manage Scotland Excel's transformation programme to support the delivery of corporate strategy and plans • Finalise a rolling plan for reviewing and evaluating key business processes and policies • Continue ICT and systems development to support the delivery of corporate strategy • Continue to review governance arrangements to create a robust framework for delivering the organisation's activities • Continue to implement plans for improving data management and business intelligence • Continue to develop a sustainable funding and delivery model for Scotland Excel

Goa1 1: Supporting the delivery of better and more effective public services

Strategic objectives	
1.1	Deliver a range of collaborative procurement and supplier development services which support customers at a strategic and operational level
1.2	Deliver a range of shared services which support customers in the development of their professional, organisational and commercial capability
1.3	Deliver a range of new shared services which support the effectiveness and efficiency of customer operations

Activity	Commitment
(a) Develop and implement a contract plan aligned to the strategic priorities of member authorities	• Deliver a rolling schedule of new contract opportunities identified and agreed with local authority stakeholders • Ensure renewed contracts continue to focus on current strategic priorities • Explore new approaches to funding and resourcing emerging opportunities including chargeable services, partnership working and portfolio restructuring • Continue to operate a flexible workforce model that allows the pursuit of emerging opportunities to expand the contract portfolio
(b) Develop and implement a strategy and plan for the delivery of contract and supplier management	• Implement a new approach to Scotland Excel's contract and supplier management (CSM) programme ensuring that the methodology, process and system provide detailed intelligence on contract and supplier performance • Continue to produce annual contract management reports for all contracts to support continuous improvement
(c) Develop and implement a strategy and plan for improving supplier performance	• Deliver an integrated programme of supplier development activity as part of Scotland Excel's CSM model • Develop plans to support the long term future of Scotland Excel's Supplier Excellence Awards • Identify and work with key suppliers within each category to explore the potential for developing long term partnerships which add value to the solutions they provide to councils

(d) Manage the rollout of a new national procurement capability assessment to the local government sector	• Complete Procurement and Commercial Capability (PCIP) assessments for participating local authorities by October 2016 • Review outputs and work with national procurement partners to agree future plans for capability assessments
(e) Develop and implement a programme to lead and support the development of procurement and commercial capability	• Continue to monitor funding and resourcing to support the sustainable delivery of procurement capability and change services to the sector • Develop and deliver a programme of procurement capability and change services, providing customers with a clear menu of inclusive and chargeable services • Deliver an annual conference which supports change and capability within the sector
(f) Develop and implement a Learning and Development strategy to support professional capability and encourage new entrants to public procurement	• Develop and implement a strategy and model for the delivery of sector training needs, partnering with educational and professional institutes to deliver training, qualifications and continuing professional development (CPD) • Develop and implement a strategy to encourage and support new entrants to public procurement, including graduate trainees and modern apprentices • Continue to develop and implement eLearning capability for the delivery of training, considering the use of external partners where appropriate
(g) Develop and implement a shared service offering for councils which meets their requirements in a changing public sector landscape	• Develop and implement a strategy for delivering additional shared services, aligned to customer needs, ensuring that each new service has a clear value proposition and can be delivered effectively and sustainably by Scotland Excel • Develop plans for reinvesting new streams of funding arising from the development of additional services to support the continuous growth of the organisation and infrastructure

Goal 2: Being sustainable in everything we do

Strategic objectives	
2.1	Work with stakeholders to develop procurement strategies which support the delivery of national and local policy priorities
2.2	Deliver positive and measurable social, economic and environmental impact to local communities
2.3	Lead and support customers in the development and implementation of best practice in sustainable procurement

Activity	Commitment
(a) Develop and implement strategies for responding to procurement and/or public sector legislation	- Continue to support our sectors in meeting duties arising from the introduction of the new procurement legislation - Monitor risks and/or opportunities arising from the local planning aspects of the Community Empowerment Bill - Continue to develop plans to engage with Integrated Joint Boards (IJBs) to secure social care procurement opportunities arising from the Public Bodies (Joint Working) Act - Continue to support councils with meeting their duties arising from the Waste (Scotland) Regulations through the development and delivery of waste services frameworks
(b) Ensure Scotland Excel's collaborative frameworks support local and national government policy priorities	- Continue to consider workforce matters in collaborative tenders, monitoring and reporting on supplier Living Wage commitments - Continue to consider other policy areas that can be supported through collaborative tenders, (e.g. fairly traded products, health and nutrition, organic and local produce) - Continue to develop social care frameworks around national outcomes, (e.g. GIRFEC, Keys to Life) - Continue to support the roll out of recommendations arising from the Construction Review

(c) Ensure Scotland Excel's collaborative frameworks support positive local economic outcomes	• Develop and implement a plan to support participation by local companies in collaborative tenders, providing regular reports to councils on the economic impact delivered for their area • Continue to incorporate community benefits in collaborative tenders to support employment, training and social inclusion at a local level • Continue to develop Scotland Excel's community benefits tracking system and provide regular reports to local authorities on the impact in their local area • Develop a strategy for engaging with supported businesses to increase opportunities for contract participation and/or working with local authorities
(d) Ensure Scotland Excel's collaborative frameworks support local government environmental duties and policies	• Continue to implement Scotland Excel's waste category strategy to support local authority compliance with climate change targets and efforts to recover value from waste • Continue to assess and mitigate the environmental impact of collaborative contracts
(e) Champion the development and dissemination of best practice in sustainable procurement	• Develop a sustainable procurement strategy to guide and support all aspects of sustainable procurement • Continue to support local authorities with meeting their sustainability duties arising from the introduction of new procurement legislation • Continue to work with partners to develop, deliver and promote tools and guidance which support sustainable procurement practices, (e.g. Flexible Framework) • Continue to monitor, review and report on macro-environmental factors affecting public procurement, sharing intelligence and guidance with local authorities

Goa1 3: Placing customers at the heart of our business

Strategic objectives	
3.1	Work with customers to develop and implement bespoke plans for maximising the value of our services
3.2	Develop robust communications strategies which support customer engagement and position Scotland Excel and its customers as leaders in public procurement / shared services
3.3	Represent the views and needs of customers in the wider stakeholder environment

Activity	Commitment
(a) Develop and implement a portfolio of account management services that meet the collective and individual needs of local authority customers	- Continue to deliver a rolling programme of account management meetings, information and services in line with plans agreed and reviewed annually with each local authority - Identify, initiate and support engagement opportunities within local authorities to facilitate awareness, understanding and uptake of Scotland Excel services across council departments - Gather, analyse and report on customer intelligence to support Scotland Excel's business decisions and ensure services remain in line with customer requirements
(b) Develop and implement a stakeholder engagement strategy that support the delivery of first class customer experience across all of our services	- Develop and implement customer service principles for all aspects of our services, ensuring that they are embodied by all Scotland Excel staff - Specify and deliver a system/process for managing customer information/preferences, ensuring that all stakeholders receive relevant and timely communication/contact appropriate to their needs - Specify and deliver an online platform for managing collaboration with customers, increasing their visibility of all contract activities, facilitating interaction and enabling self-service - Specify and deliver a system/process for managing customer complaints, including regular analysis of data to identify common issues and eliminate root causes of dissatisfaction - Monitor customer feedback and satisfaction levels, identifying and responding to opportunities for improvement

(c) Develop and implement a corporate communications strategy that enhances and protects Scotland Excel's corporate reputation	• Continue to deliver a rolling programme of campaigns, events and activities which market Scotland Excel's services and promote the impact of our work to a wide range of stakeholders • Launch Scotland Excel's refreshed website and maintain as the primary source of accurate and up-to-date corporate news and information • Continue to identify, monitor and manage all communications risks arising from Scotland Excel's collaborative contracts and/or other business activities
(d) Develop and implement a model for associate members which delivers clear business and financial benefits to Scotland Excel and the membership base	• Continue to develop and market a segmented membership offering for existing associate members, with clear costs, benefits and transparency around contract usage • Develop and implement a strategy to identify and secure new associate members to increase contract spend, achieve better pricing/benefits for all members, and generate funding for reinvestment in Scotland Excel
(e) Develop and implement a programme for engaging with the wider public sector to ensure Scotland Excel has the right partnerships in place to support the needs of its customers	• Continue to host and/or attend local authority forums to share information, reach consensus on sector views and secure a mandate to lead/influence on behalf of the sector where appropriate • Continue to represent and champion the views and requirements of the sector within the Public Procurement Reform Programme, and strengthen positive working partnerships with other Centres of Procurement Expertise • Continue to develop and maintain relationships with key national/local bodies or groups that can influence public policy, (e.g. COSLA, Improvement Service, Scottish Care, CCPS, FSB, Chambers of Commerce) • Continue to develop relationships and build influence with key partners and representative bodies for public service areas supported by collaborative procurement, (e.g. SFT, SCOTs, Social Work Scotland, Zero Waste Scotland)

Goa1 4: Becoming the partner of choice for delivering shared services

Strategic objectives	
4.1	Implement organisational development policies which support a highly skilled, motivated and engaged workforce
4.2	Implement best practice processes and technology which support the efficient and effective delivery of services to customers
4.3	Implement robust strategies, governance, risk management and funding models which demonstrate a measurable return on investment and secure Scotland Excel's future

Activity	Commitment
(a) Develop and implement a strategy to support staff recruitment, retention, development, performance and engagement	- Continue to implement rolling workforce forecasts and plans to ensure that Scotland Excel always has the right mix of people and skills to deliver its corporate strategy and operational plans - Continue to develop and implement a recruitment management strategy, including the implementation of a new careers microsite and effective candidate management processes - Develop and implement an employee performance management policy and process which ensures that all job descriptions, competencies and behaviours are clearly aligned with Scotland Excel's vision, mission, values and plans - Continue to implement employee development plans which are clearly aligned to identified corporate and personal training needs, offer a route to career progression, support staff retention and ensure effective succession planning - Develop and implement an employee engagement and reward strategy to support staff motivation, retention, communication and wellbeing

(b) Develop and implement programmes to support the continuous improvement of business performance, systems and processes	• Review and manage Scotland Excel's transformation programme to ensure it continues to support the delivery of the 2015-18 corporate strategy and operational plans • Continue to develop and implement a programme of ICT and systems development to support the delivery of business activities identified in the 2015-18 corporate strategy, operational plans and the transformation programme • Continue to establish an information ICT infrastructure to support organisational flexibility and growth, and provide efficient and effective support for all technologies utilised • Create a quality assurance forum and develop a rolling plan for reviewing and evaluating key business processes • Continue to build relationships with academic, business and professional partners which support the development and sharing of innovation and best practice • Retain Investors in People (IIP) and Chartered Institute of Procurement and Supply (CIPS) accreditation, and seek accreditation for other areas of the business as appropriate
(c) Ensure that Scotland Excel delivers its plans through effective governance, risk management and policies	• Continue to review and update Scotland Excel's governance model to ensure that it provides the optimum level of oversight of the organisation's performance and business activities • Continue to review and report on identified corporate and contract risks in line with Scotland Excel's risk management methodology and plan • Continue to develop and implement a rolling plan for reviewing Scotland Excel's corporate policies to ensure they provide an appropriate and supportive framework for business activities and performance • Implement performance monitoring and reporting procedures to facilitate the provision of regular reports on all aspects of business performance
(d) Develop and implement a strategy for gathering, analysing and distributing business intelligence within Scotland Excel and across the sector	• Continue to manage data, information and intelligence across the organisation, ensuring that all staff have access to the knowledge they require to deliver their goals • Continue to investigate opportunities for extending business intelligence services to local authority customers, ensuring a clear value proposition that can be delivered effectively and sustainably by Scotland Excel
(e) Develop and implement a clear, transparent and sustainable funding and	• Continue to develop and implement a transparent funding model, based around core and chargeable services, to finance the organisation between 2015 and 2018

delivery model for Scotland Excel	• Continue to review Scotland Excel's business delivery model, ensuring that all fixed and operational costs return optimal efficiency and value for money • Continue to explore opportunities for securing and managing rebates and/or supplier levies from collaborative contracts on behalf of councils to support reinvestment in Scotland Excel's future growth • Complete ongoing reviews of the funding and business delivery models, incorporating costs and revenues from the launch of new shared services as appropriate
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Measuring performance

To ensure that we are meeting our goals and objectives, and delivering the desired outcomes from our corporate strategy, we will use a range of indicators and measures to monitor our performance and report our progress. Specific KPIs and/or targets to ensure the delivery of our activities and commitments will be set within project, team and individual performance plans.

Outcome	Indicators of success
Our services support the effective and efficient delivery of public services	• Spend and savings statistics • Contract and supplier management scorecards • Contract development timeframes • Council contract participation rates • Innovation case studies
Our expertise supports continuous improvement in procurement performance	• Procurement capability scores • Learning and development participation statistics
Our services support the implementation of national and local policy priorities	• Contract performance statistics • Community benefits case studies • Stakeholder feedback
Our services help to deliver positive and sustainable outcomes for communities and service users	• Community benefits case studies • Local economic impact statistics • SME participation in collaborative frameworks
Our customers receive relevant communication and support	• Account management coverage • Customer satisfaction survey results • Web usage statistics

Our reputation demonstrates the value of collaboration	• Media articles published • Invitations to speak at events and conferences • Web usage statistics
Our people, policies, processes and technology optimise our value	• Skills and qualifications of staff • Staff engagement survey results • ICT/process efficiencies • Customer satisfaction survey results • Professional accreditations
Our customers are satisfied with our services and achieve a measurable return on their investment	• Customer satisfaction survey results • Spend and savings statistics • Local economic impact statistics