

## **Notice of Meeting and Agenda Scotland Excel Executive Sub-committee**

<b>Date</b>	<b>Time</b>	<b>Venue</b>
Friday, 19 April 2024	09:30	Remotely by MS teams,

MARK CONAGHAN  
Clerk

### **Membership**

Councillor John Shaw (Renfrewshire Council) (Convener) and Councillor Altany Craik (Fife Council) (Vice Convener).

Councillor David Keating (Aberdeenshire Council): Councillor Brenda Durno (Angus Council): Councillor Mandy Watt (City of Edinburgh Council): Councillor Kenny Macleod (Comhairle Nan Eilean Siar): Councillor Carlyne Wilson (Dumfries & Galloway Council): Councillor Ruairi Kelly (Glasgow City Council): Councillor Derek Loudon (Highland Council): Councillor Christina Larsen (North Ayrshire Council): Councillor Michael McPake (North Lanarkshire Council): Councillor Dennis Leask (Shetland Islands Council): Councillor Chris Cullen (South Ayrshire Council): Councillor Walter Brogan (South Lanarkshire Council).

### **Further Information - online meetings only**

This meeting is on-line only but is a meeting which is open to members of the public by prior arrangement. A copy of the agenda and reports for this meeting will be available for inspection prior to the meeting at the Customer Service Centre, Renfrewshire House, Cotton Street, Paisley and online at <http://renfrewshire.cmis.uk.com/renfrewshire/CouncilandBoards.aspx>

For further information, please email [democratic-services@renfrewshire.gov.uk](mailto:democratic-services@renfrewshire.gov.uk)

## **Members of the Press and Public - contact details**

Members of the press and public wishing to attend the meeting should contact [democratic-services@renfrewshire.gov.uk](mailto:democratic-services@renfrewshire.gov.uk) to allow the necessary arrangements to be made.

## Items of business

### Apologies

Apologies from members.

### Declarations of Interest and Transparency Statements

Members are asked to declare an interest or make a transparency statement in any item(s) on the agenda and to provide a brief explanation of the nature of the interest or the transparency statement.

- |             |  |                |
|-------------|--|----------------|
| <b>1</b>    | <b>Minute</b>  | <b>5 - 10</b>  |
|             | Minute of meeting of the Executive Sub-committee held on 15 March 2024.                      |                |
| <b>2</b>    | <b>Chief Executive's Update Report to Chief Officers Management Group</b>                    | <b>11 - 18</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |
| <b>3(a)</b> | <b>Contract for Approval: Supply and Distribution of Fresh Fruit and Vegetables</b>          | <b>19 - 30</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |
| <b>3(b)</b> | <b>Contract for Approval: Supply, Delivery, Maintenance and Repair of Cleaning Equipment</b> | <b>31 - 42</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |
| <b>3(c)</b> | <b>Contract for Approval: Construction Materials</b>   |                |
|             | Report by Chief Executive of Scotland Excel. (not available - copy to follow)                |                |
| <b>4</b>    | <b>Request for Associate Membership: The National Records of Scotland</b>                    | <b>43 - 44</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |
| <b>5</b>    | <b>Academy Strategy</b>  | <b>45 - 56</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |
| <b>6</b>    | <b>Buy Social Scotland Business Pledge</b>   | <b>57 - 58</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |
| <b>7</b>    | <b>Employee Supporting Attendance Report</b>   | <b>59 - 62</b> |
|             | Report by Chief Executive of Scotland Excel.   |                |

## **8 Date of Next Meeting**

Note that the next meeting of the Executive Sub-committee will be held remotely on MS teams at 9.30 am on 17 May 2024.



## Minute of Meeting Scotland Excel Executive Sub-committee

Date	Time	Venue
Friday, 15 March 2024	09:30	Remotely by MS teams,

### Present

Councillor David Keating (Aberdeenshire Council); Councillor Brenda Durno (Angus Council); Councillor Mandy Watt (City of Edinburgh Council); Councillor Kenny Macleod (Comhairle Nan Eilean Siar); Councillor Carlyne Wilson (Dumfries & Galloway Council); Councillor Altany Craik (Fife Council); Councillor Ruairi Kelly (Glasgow City Council); Councillor Derek Loudon (Highland Council); Councillor Christina Larson (North Ayrshire Council); Councillor Michael McPake (North Lanarkshire Council); Councillor John Shaw (Renfrewshire Council); Councillor Dennis Leask (Shetland Islands Council); Councillor Chris Cullen (South Ayrshire Council) and Councillor Walter Brogan (South Lanarkshire Council).

### Chair

Councillor Shaw, Convener, presided.

### In Attendance

J Welsh, Chief Executive, H Carr, Director of Strategic Procurement, S Brannagan, Director of Customer & Business Services, L Campbell, Customer Services Manager, M Mitchell, Chief Procurement Officer, L Muir, Strategic Programme Manager, N Hyde, Skills Resources Manager, S Christie, Commercial Programme Manager, K Forrest, Office Manager, J McKerrell, Strategic Commissioning Manager, J Weaver, Assistant Category Manager, R Baird and G Maxwell, both Procurement Co-ordinators, L Mooney, Senior Communications Specialist and J Campbell, Category Manager, Social Care (all Scotland Excel); L Mitchell, Managing Solicitor (Contracts & Conveyancing), A Burns, Corporate Finance Manager, D Blackburn, Principal Accountant, A Anwar, Solicitor, R Devine, Senior Committee Services Officer and T McGowan, Senior Accountancy Assistant (all Renfrewshire Council) and A Kilodziej, Senior Manager (Azets).

## **Declarations of Interest and Transparency Statements**

There were no declarations of interest or transparency statements intimated prior to the commencement of the meeting.

### **1 Minute**

There was submitted the Minute of the meeting of the Executive Sub-committee held on 16 February 2024.

In relation to item 4 – Project Proposals – it was agreed that the Minute be amended to reflect that the posts created within the National Savings Team were fixed term contracts.

**DECIDED:** That the Minute, as amended, be approved.

### **2 Revenue Budget Monitoring**

There was submitted a joint revenue budget monitoring report by the Treasurer and the Chief Executive of Scotland Excel for the period 1 April 2023 to 2 February 2024.

The report advised that at the end of period 11, Scotland Excel was projecting a £57,000 underspend by year-end in its Core activities and an increase of £358,000 in Project income..

**DECIDED:** That the report be noted.

### **3 Annual Audit Plan 2023/24**

There was submitted a report by the Treasurer relative to the Annual Audit Plan 2023/24 for Scotland Excel which outlined Azets timescales and planned audit activity during the audit of the 2023/24 Annual Accounts, a copy of which was appended to the report.

The report intimated that Azets had submitted an Audit Plan which outlined the approach to the audit of the 2023/24 Annual Accounts to assess whether the accounts provided a true and fair view of the organisation's financial position and also whether the accounts had been prepared in accordance with proper accounting practice, the Code of Practice on Local Authority Accounting in the UK 2023/24.

The Audit Plan outlined the responsibilities of Scotland Excel and Azets; the assessment of key challenges and risks; and the approach and timetable for completion of the audit. The report advised that the statutory deadline for the approval of the audited accounts for 2023/24 was 30 September 2024 and that the Annual Audit Report was planned to be reported to the meeting of the Executive Sub-committee scheduled to be held on 20 September 2024.

The report noted that the proposed audit fee was indicated at £9,790 for the current financial year.

Adrian Kolodziej, Senior Manager, Azets, presented the Audit Plan to members.

**DECIDED:**

(a) That the Annual Audit Plan 2023/24 by Azets, appended to the report, be noted; and

(b) That the proposed audit fee of £9,790 be approved.

**4 Operating Plan Update 2023/24**

There was submitted a report by the Chief Executive of Scotland Excel providing an update on the Operating Plan 2023/24, a copy of which was appended to the report.

The report intimated that the new five-year Corporate Strategy had been approved at the meeting of the Joint Committee held on 9 December 2022. The Strategy was supported by Annual Operating Plans and the report provided an update on operating plan activity between 1 April 2023 to 31 March 2024.

The report highlighted that, since approval of the Operating Plan, senior local authority stakeholders had indicated that one of the corporate goals, the drive for efficiency to support the financial sustainability of local public service, should be prioritised during 2023/24 and Scotland Excel had been working to understand how it could grow and accelerate deliverables against this key goal. A dedicated team had been established to manage this work.

The report noted that progress reports were produced quarterly to track Scotland Excel's activity against Operating Plan commitments and at the end of each quarter reports were submitted to the Executive Sub-committee.

It was proposed that, in order to facilitate improved governance, completion dates be included in future reports. This was agreed.

**DECIDED:**

(a) That Scotland Excel's progress in delivering the actions contained within the Operating Plan 2023/24 be noted; and

(b) That, in order to facilitate improved governance, completion dates be included in future reports.

**5(a) Contract for Approval: Residential Rehabilitation (Alcohol and Drugs) Services National Flexible Framework Agreement**

There was submitted a report by the Chief Executive of Scotland Excel relative to the Residential Rehabilitation (Alcohol and Drugs) Services National Flexible Framework Agreement for a period of 48 months with the option to extend on two occasions, each for a period of up to one year, up to a maximum duration of four years. It was noted

that subject to approval and completion of a standstill period, the flexible framework would commence on 1 April 2024.

The report intimated that there was a wide diversity of types and models of rehabilitation services, including supported accommodation or housing support models, care homes and private hospitals. The flexible framework would provide a new national purchasing and contracting agreement to support national objectives, priorities and ongoing improvement work in Scotland and had been developed to take account of the views and contributions of a wide range of partners and stakeholders. The services covered by the proposed framework agreement fell within the 'Social and Other Specific Services' category as defined in Schedule 3 of the Public Contracts (Scotland) Regulations 2015 and therefore the flexibilities under the 'light touch' procurement regime could be applied. A flexible framework agreement was proposed to enable growth and the admission of new entrants continuously once established. Providers on the flexible framework agreement would also be able to add new services and vary their service offerings and section 3 of the report provided further detail.

The report summarised the outcome of the procurement process for the flexible framework and advised that the advertised value of the proposed flexible framework was approximately £60 million over the four-year period. Appendix 1 to the report detailed the participation summary of those participating in the flexible framework.

Tender responses had been received from 11 applicants. Two applicants were not eligible for admission at this time as they did not have formal confirmation from the Scottish Government that their rehabilitation services met the Scottish Government's national definition of residential rehabilitation and one provider, who offered three services, had their submission in respect of one service excluded from their application for the same reason. Appendix 2 to the report provided a summary of the offers received.

Based on the criteria and scoring methodology set out in the published application documents, a full evaluation of the compliant offers had been completed and Appendix 2 to the report confirmed the scoring achieved by each applicant for each rehabilitation service.

Based on the evaluation undertaken, and in line with the criteria and weightings set out in the report, it was recommended that nine providers and 13 rehabilitation services be awarded to the flexible framework from its commencement, as outlined in Appendix 2 to the report, subject to satisfactory conclusion of insurance checks.

The report detailed the approach taken by suppliers in relation to fair work practices and their position on the payment of the Real Living Wage together with the other benefits that would be achieved through the flexible framework. The report intimated that, in accordance with Scotland Excel's established contract and supplier management programme, the framework had been classified as Class A.

**DECIDED:**

(a) That the award of the flexible framework for Residential Rehabilitation (Alcohol and Drugs) Services, as detailed in Appendix 2 to the report, be approved;

(b) That authority be delegated to the Chief Executive of Scotland Excel, or Director of Strategic Procurement in the Chief Executive's absence, to approve recommendations following the evaluation of offers received during the lifetime of the flexible framework,



or following the consideration of formal requests from existing providers for the addition of new services and/or variation of existing services; and

(c) That it be noted that the Executive Sub-committee would be updated on the appointment of any new providers to the flexible framework agreement on an annual basis via incorporation to the Annual Procurement Report

5(b) **Contract for Approval: Supply and Delivery of Road Signage Materials**

There was submitted a report by the Chief Executive of Scotland Excel relative to the award of a fourth-generation renewal framework for the Supply and Delivery of Road Signage Materials for a period of 48 months, comprising an initial period of 24 months with the option to extend for up to a further two 12-month periods, subject to satisfactory operation and performance. It was noted that subject to approval and completion of a standstill period, the framework would commence on or around 1 April 2024.

The report intimated that the framework would allow Councils to procure a range of road signage materials including permanent and temporary road signage, signposts, electric road signage and associated products.

The report summarised the outcome of the procurement process which contained four lots, as detailed in Table 1 of the report. The framework had been advertised at a value of £1.25 million per annum, totalling an estimated spend of £5 million over the maximum four-year period of the framework. This advertised spend allowed for increased participation from Councils and associate members not currently utilising the framework. Appendix 1 to the report detailed the participation, spend and savings summary for those participating in the framework.

Tender responses had been received from 10 suppliers and, based on the criteria and scoring methodology set out in the tender documents, a full evaluation of the offers had been carried out with the confirmed overall scoring achieved by each supplier detailed in Appendix 2 to the report.

Based on the evaluation undertaken, and in line with the advertised criteria and weightings set out in the report, it was recommended that a multi-supplier framework agreement be awarded to all 10 suppliers, as outlined in Appendix 2 to the report, subject to satisfactory conclusion of insurance checks.

The report detailed the approach taken by suppliers in relation to fair work practices and their position on the payment of the Real Living Wage together with the other benefits that would be achieved through the framework. The report intimated that, in accordance with Scotland Excel's established contract classification tool, the framework had been classified as class D. It was noted that Stocksigns Limited were now an accredited Living Wage employer.

**DECIDED:** That the award of the framework agreement for the Supply and Delivery of Road Signage Materials, as detailed in Appendix 2 to the report, be approved.

## 6 **Project Proposal**

There was submitted a report by the Chief Executive of Scotland Excel relative to an additional project being proposed on the use of reserves as a result of surpluses which would be generated by pension fund changes.

The report intimated that when considering the Revenue Estimates for 2024/25 at the meeting of the Joint Committee held on 8 December 2023 it was noted that Strathclyde Pension Fund had advised that, as a result of higher than anticipated returns from investments, the fund was 147% funded against current and anticipated future commitments. At that meeting it was agreed that the anticipated operating surplus be retained, ring-fenced within reserves with any draw down to be approved by the Executive Sub-committee.

The report provided detail on a project to fund an additional Contracts Solicitor within Renfrewshire Council's Legal and Democratic Service to support Scotland Excel in the expansion of the collaborative contract portfolio. The report provided further detail on the project and highlighted that the funding requirement for this project would be £67,214 for year 1 and £70,574 for year 2.

**DECIDED:** That the project funding and draw down from agreed reserves for 2024/25 of £67,214 and £70,574 for 2025/26 be approved.

## 7 **Date of Next Meeting**

**DECIDED:** That it be noted that the next meeting of the Executive Sub-committee would be held remotely on MS teams at 9.30 am on 19 April 2024.

## Scotland Excel

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

**Chief Executive's Update Report to Chief Executive Officers Management Group  
(CEOMG) – April 2024**

### **1. Summary**

The purpose of this report is to share the Chief Executive's Update Report which was issued to Council Chief Executives at the CEOMG on 18<sup>th</sup> March 2024.

### **2. Background**

The Scotland Excel CEOMG meets quarterly. As part of the regular governance process the Chief Executive provides an update on the work of Scotland Excel. Following discussions with the Scotland Excel Convener, it was agreed that this report – and any future reports – will be shared with members of the Scotland Excel Executive Subcommittee following the CEOMG meeting. The report shown at Appendix 1 provided an update to the CEOMG for the period between November 2023 and March 2024.

### **3. Recommendations**

Members are asked to note the report.



## **Scotland Excel**

**To: Chief Executive Officers Management Group**

**On: 18 March 2024**

### **Chief Executive's Update Report**

#### **1. Introduction**

The purpose of this report is to provide an update on key developments within Scotland Excel since the last meeting of the Chief Executive Officers Management Group (CEOMG) on 08 November 2023. The format of the report has been refreshed for 2024 to reflect the key strategic activities and outputs delivered by each team within Scotland Excel's corporate structure.

#### **2. Strategic Overview**

As requested by members, Scotland Excel continues to focus on driving efficiency to support the financial sustainability of local public services, one of five strategic goals which underpin the organisation's 2023-28 corporate strategy. The 2023-24 operating plan which supports this strategy is now coming to a close, and Scotland Excel's joint committee approved a new operating plan for 2024-25 at their meeting in December.

Scotland Excel has completed the first phase of a workforce planning exercise to support the delivery of the corporate strategy. The strategic procurement function has been streamlined to amplify the commercial value of collaborative contracting, while continuing to recognise the positive social and environmental impact procurement and commissioning supports within communities.

The new structure also brings together teams delivering savings opportunities and flexible procurement services, along with the Scotland Excel Academy, to provide a joined-up approach to enhancing commercial acumen, procurement capability and capacity within the sector.

Workforce planning is also supporting new entrants to the public procurement profession to help fulfil the growing sector demand for an experienced and qualified workforce. In 2022, Scotland Excel relaunched its graduate programme, resulting in eight trainees undertaking a 'fast track' route to skills development in procurement and associated disciplines. As of January, six graduates were confirmed in mid-level practitioner roles, and a campaign to recruit a new cohort of four graduate trainees commenced in March 2024.

In addition to workforce planning, Scotland Excel continues to pursue an ongoing commitment to business improvement. Data management and ICT capability will, together, form a core foundation for many of the improvements planned over the period of the corporate strategy. This will deliver significant efficiency benefits for the organisation while also enhancing the business intelligence, management information and reporting that is available to members.

While this is a long-term project, some early progress has already been made. A business intelligence strategy was approved by the executive sub-committee in February 2024, and a new performance management framework is currently in development to underpin a commercial and community focus to value delivery for our members. Early discussions have taken place to scope a new ICT structure to guide the evolution of systems which will support these aims.

Scotland Excel continues to engage with the Scottish Government and other public sector stakeholders to promote and represent the interests of local government procurement when appropriate. Having submitted a written response to a 'call for views' from the Scottish Parliament's Economy and Fair Work Committee in October, Scotland Excel gave oral evidence to the committee in March 2024 highlighting the progress made in opening up public procurement opportunities for local SME businesses and the third sector.

### **3. Strategic Procurement & Commissioning**

Scotland Excel has restructured its strategic procurement function to reflect the changing demands of the sector.

The new structure comprises two teams: strategic procurement which now incorporates all categories other than social care to promote synergy in the pursuit of collaborative contracting opportunities; and strategic commissioning which will continue to focus on growing demand for social care contracting within a complex political and stakeholder landscape.

The two senior managers for these teams are now in post, and further restructuring will take place within the teams over the coming months.

#### **3.1 Recent Awards**

Four frameworks have been approved by Scotland Excel's executive sub-committee since the CEOMG last met in November.

A new framework for grounds and plant equipment was approved in January. This framework brings together two previous frameworks with a common supply base to create efficiencies for both buyers and suppliers.

A renewal framework for security services and cash collection was also approved at the January meeting. Payment of the Real Living Wage formed one of the key criteria for award of this framework.

A framework for civic supplies was approved at the February meeting of the executive sub-committee. This single supplier framework provides an effective

route to market for alcoholic and non-alcoholic beverages served at civic functions or sold in council premises with bar facilities.

A renewal framework for road signage materials was approved by the executive sub-committee in March. Previous generations of this framework have been a successful vehicle for the inclusion of a supported business in local government supply chains.

### **3.2 Key Frameworks in Development**

A new construction materials framework will be presented to executive sub-committee for approval during the next quarter. This framework brings together six previous frameworks to improve efficiency and drive savings. Also within the construction portfolio, the next generation new build residential construction framework is expected to be approved in the summer. This new framework incorporates innovative specifications which meet Passivhaus and Net Zero standards.

A new national framework for alcohol and drug residential rehabilitation services, developed with funding from the Scottish Government, will be submitted to the executive sub-committee for approval during the next quarter. Work to develop the second generation flexible framework for care and support services is continuing and will be presented to committee in the autumn.

### **3.3 Social Care**

Fee negotiations for the National Care Home Contract (NCHC) have been concluded, with providers accepting an 8.3% increase for residential care and 6.76% increase for nursing care. The current NCHC is being updated to incorporate legislative and practice changes while work continues on framework redesign.

In February, Scotland Excel held a successful event in partnership with the Coalition of Care Providers in Scotland (CPPS). The event brought representatives from both organisations, as well as care providers, to create a better understanding of Scotland Excel's remit and explore ways of working together more effectively in future.

## **4. Resources & Skills**

As part of ongoing workforce planning, Scotland Excel has established a new team within the Customer & Business Services function which brings together key customer-facing services which respond to continuing growth in demand for procurement resources and skills development.

To support this, a new senior strategic post of Skills & Resources Manager has been implemented to oversee the work of teams delivering saving opportunities and flexible procurement, as well as the Scotland Excel Academy.

#### **4.1 Savings Opportunities**

Scotland Excel's savings team continue to make good progress towards their first-year target to identify £5m in savings opportunities. Over £7m of potential savings are being explored, with £4m already notified to councils. The savings opportunities cover a wide range of goods and services including food, waste and janitorial products, purchase card payment rebates, and software licence agreements. Other opportunities currently being explored include occupational health, insurance, and mobile phones.

#### **4.2 Flexible Procurement**

The Flexible Procurement Service is continuing to grow and deliver a quality service to Council's. The team currently has eleven projects underway and a further ten potential projects in the pipeline.

#### **4.3 Scotland Excel Academy**

The Scotland Excel Academy is developing a programme of free training for councils which will increase the commercial skills and knowledge of procurement practitioners. This training will develop their understanding of the key drivers within markets and supply chains so that they can maximise the value of procurement activity through negotiation, supply chain engagement, and strategic contract and supplier management.

A new two-year strategy for the Academy will be presented to the executive sub-committee for approval in April and will include plans to develop and deliver training for social care commissioners.

### **5. Commercial Services**

Projects for Stirling and South Lanarkshire Councils have now successfully concluded. The latter project achieved savings of more than £3.5m, which greatly surpassed the initial £1.3m target. The procurement transformation programme for Dundee City Council has entered its second year and continues to make significant progress.

A third tranche of Procurement & Commercial Improvement Programme assessments are underway, with 24 council opting to take part in this cycle. Scotland Excel has held a series of workshops with councils to help them prepare for the assessment which will identify examples of good practice and opportunities for improvement. Learning arising from the programme will be shared with all members.

Scotland Excel is developing plans for its annual conference on 21-22 May which will provide a platform for delegates to share good practice and take part in solution-focused discussion. The first day of the conference will take place online to accommodate a wide audience from councils and other public sector organisations. The second day of conference is targeted towards senior procurement professionals from local authorities and will take place in Glasgow.



Eight new associate members have been approved since the report to the CEOMG in November. The new members encompass three charities, Capability Scotland, Scottish SPCA and Jane Moore Trust, and five housing associations, Paragon Lochfield Park, Linstone, Riverside and Clydesdale. Annual fee income generated by these members is £12,840.





## Scotland Excel

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

**Tender: Supply and Distribution of Fresh Fruit & Vegetables**

**Schedule: 0823**

**Period: 48 months**

### **1. Introduction and Background**

This recommendation is for the award of the second-generation renewal framework for the Supply and Distribution of Fresh Fruit & Vegetables.

This framework will provide councils with a mechanism to procure a range of fresh fruit and vegetable products including but not limited to, fresh apples, bananas, grapes, pears, strawberries, carrots, turnip, cabbage, corn and other associated products.

The framework will be for a period of up to 48 months, Subject to approval, the framework is intended to commence on or around June 2024.

This report summarises the outcome of the procurement process for this national framework agreement and presents recommendations for award.

### **2. Scope, Participation and Spend**

The current tender has been simplified and streamlined, with the previous 2 lots incorporated into a single requirement in order to offer best value to Councils. This was approved as part of the strategy development and through consultation with the User Intelligence Groups (UIG).

As detailed in Appendix 1, 17 councils plus Tayside Contracts confirmed their intention to participate in this framework, with all councils being named on the advertised contract notice. Scotland Excel will work with members and Project and Account Managers to increase uptake.

The framework was advertised with a value of up to £6 million per annum which totals to an estimated spend of £24 million over the maximum 4-year period. This figure was derived based on historical information and future plans as confirmed by Scotland Excel members.

### 3. Procurement Process

A Prior Information Notice (PIN) was published on 21<sup>st</sup> August 2023 which resulted in expressions of interest from seven suppliers.

Thereafter, the Contract Notice was published via the Find a Tender and Public Contracts Scotland (PCS) portal on 11<sup>th</sup> January, with the tender documentation being immediately available via the Public Contracts Scotland Tender (PCS-T) system. The tender exercise was conducted and concluded in accordance with the law and procedures currently in force.

After publication, the Contract Notice was shared with Scotland Food and Drink, Soil Association, Nourish Scotland and the National Veg Summit to share on social media sites and encourage local suppliers to participate in the tender.

The procurement exercise followed an open tender procedure to encourage maximum competition.

The tender followed a two-stage tendering procedure.

Stage one, Qualification, was conducted using the Single Procurement Document (SPD). Within the SPD, tenderers were required to answer a set of exclusionary questions along with providing details and/or acknowledgement of insurance, financial standing, quality management, and environmental management policies and/or procedures.

At the second stage of the process, compliant offers were evaluated against the award criteria and weightings outlined in Table 1.

**Table 1: Evaluation Criteria/Weighting**

Award Criteria	Total Available Scores
Qualification Section (SPD)	Pass/Fail
Technical Section	25
Commercial Section	75

Tenderers were required to indicate which local authorities they had an ability to service.

Tenderers were invited to bid on the following basis:

- In the commercial section, each tenderer required to submit a price for at least 70% of the Goods listed within the Schedule of Offer

Further non scored commercial questions had important contractual effects. Namely:

- % On-cost applicable to Tender Prices
- % discount applicable to Tender Prices

In the Technical Section, as outlined in Table 2, by the evaluation of scored method statements on:

- Supply Chain and Quality of Products
- Service, Delivery and Contract Management
- Fair Work First
- Sustainability
- Community Benefits.

Further non scored technical questions had important contractual effects and included:

- Ability to Service
- Ability to transact
- Vehicle Environmental Standards
- Real Living Wage

**Table 2: Method Statement Scoring**

<b>Section</b>	<b>Question</b>	<b>Maximum Score Available</b>
<b>Technical 25%</b>	Supply Chain and Quality of Products	<b>10</b>
	Service, Delivery and Contract Management	<b>4</b>
	Fair Work First	<b>4</b>
	Sustainability	<b>4</b>
	Community Benefits	<b>3</b>

Scoring was completed in accordance with the published tender evaluation methodology to calculate a total score.

Scotland Excel has taken cognisance of the current situation relative to the Coronavirus (Covid19) pandemic and its continued impact. Scotland Excel has determined to proceed with the tender exercise to establish this framework, and will monitor the situation throughout the period of the tender exercise, taking cognisance of all relevant circumstances in coming to any decision to recommend the award of Framework placings to successful Tenderers.

#### **4. Report on Offers Received**

The tender documents were downloaded by 15 suppliers, with 10 tender responses received by the specified closing date and time.

A summary of the offers received, and the scoring achieved by the recommended tenderers is set out in Appendix 2.

#### **5. Recommendations**

Based on the evaluation undertaken, and in line with the advertised criteria and weightings summarised above, it is recommended that a multi-supplier framework arrangement is awarded to all 10 suppliers as outlined in Appendix 2 subject to satisfactory conclusion of insurance checks.

The 10 recommended suppliers offer best value and represent a mix of small, medium and micro-organisations.

The range of suppliers recommended provides coverage and competitive options for all participating bodies as well as offering a degree of choice and capacity along with an increase of coverage across council areas from the 1<sup>st</sup> generation of the framework.

The Executive Sub Committee is accordingly requested to approve the recommendation to award this framework as detailed within Appendix 2.

#### **6. Benefits**

##### **Savings**

Scotland Excel has conducted a benchmarking exercise comparing current pricing against the pricing submitted within the renewal tender. The result of this benchmarking is listed in Appendix 1. The projected average saving across all councils is 7.19%, which equates to an estimated total saving of approximately £297,281 per annum based on current forecast spend levels.

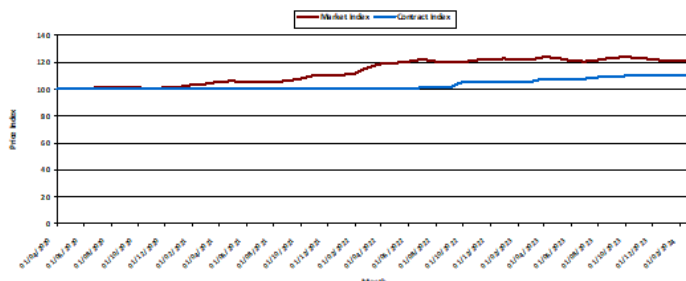
As demonstrated in figure1 Scotland Excel are currently operating 10% below the marketplace.

## Indexation Report - Fresh Fruit & Veg



Schedule No: 1019  
 Contract Title: Supply & Distribution Of Fresh Fruit & Veg  
 Contract Manager: Nicola Howie  
 Start Date: 01/04/2020

Index	Type	Index Weighting (%)
Other Processed and Preserved Fruit and Veget	Specific	40
Road Fuel - Diesel	Standard	20
National Minimum Wage 25+	Specific	20
Consumer Price Index	Standard	20



**Notes:**

The Contract Index tracks the general movement in contract pricing and not the actual contract price paid. The Market Index tracks the general market movement against a weighted basket of relevant indices and not the current index levels. This report should be used as a guide only.

Produced by Scotland Excel – 06/03/24

**Figure 1 – Indexation report March 2024**

These savings are summarised in Table 3 in accordance with the Scottish Government procurement benefits reporting guidance.

Table 3: Benefit Types

Reference	Type	Reportable Outcome
BT1	Direct price-based savings	£297,281
BT2	Price versus market savings	10%
BT3	Process savings from use of collaborative arrangements	£225,000

**Price Stability**

Pricing is fixed for the initial 6-month period of the framework. The flexibility to respond to exceptional situations was retained within the contract. Thereafter, all requests for price increases will be evaluated according to the Terms and Conditions of the framework and require to be supported by documentary evidence.

After the initial 6 months, the supplier may submit a request for a price variance on a 6-monthly basis. The supplier may submit a price decrease at any time throughout the duration of the framework.

## **Rebate**

Where the Contractor reaches spend of over £250,000 per annum for both core and non-core items, for all framework spend a rebate will apply. Framework spend includes spend for all participating councils, associate members and cross collaborating authorities for all Goods within the scope of the framework. A rebate of 0.5% will be applicable on the Contractor's spend above £250,000. Please note, the rebate will not apply to the first £250,000 of the Contractor's spend.

This rebate will be calculated on an annual basis.

## **Sustainable Procurement Benefits**

The following sustainability benefits represent the Scottish Government reporting guidance for sustainability-based benefits (BT14).

Within the technical section of the tender, Scotland Excel included a sustainability related method statement, which included, question around the following areas:

- Reducing Plastic and alternative solutions
- Develop reusable, returnable packaging
- Food Waste Prevention
- Reducing CO2 Emissions and Food Miles

Responses received as part of the tender exercise are summarised, below:

In terms of reducing plastics suppliers are using sustainable alternatives like compostable plastic and plant-based materials.

To prevent food waste suppliers are donating produce to local soup kitchens, homeless charities, and foodbanks.

Suppliers reduce CO2 Emissions and Food Miles by consolidating routes, using route planning tools and using vehicles that are Euro 6 Compliant.

Scotland Excel will continue to monitor Fair Work Practices, including encouraging further uptake by suppliers committing to paying staff the Real Living Wage, during contract and supplier management activity.

## **Community Benefits**

Scotland Excel is committed to maximising community benefits delivery for members. The supplier was asked to commit to the delivery of community benefit initiatives, against pre-agreed spend thresholds outlined within the community



benefits method statement. These aim to be reflective of the National Indicators outlined within the Scottish Government's National Performance framework, and their underlying vision and goals. Councils will accrue 'community benefit points' based on their level of spending with a supplier. These 'points' correlate to a negotiable benefit that the council can elect to receive at any given point throughout the lifetime of the framework. The 10 recommended suppliers are committed to delivering these benefits. Scotland Excel will continue to engage with the appointed supplier to drive maximum adoption and delivery of community benefits where appropriate.

Within the published tender documents, the supplier was given a list of indicative community benefits that could be agreed with councils. Examples of these were:

- Employability workshop or events in schools, college or community groups
- Sponsorship of local sports teams and community events
- Donations of products and vouchers
- Recruitment of apprentices and full-time employees.

Scotland Excel will monitor delivery of these commitments during the lifetime of the framework, and this will also be reported through ongoing contract management returns.

### **Fair Work First Including the Real Living Wage**

Scotland Excel and its members are committed to the delivery of high-quality public services and recognise that this is dependent on a workforce that is well-rewarded, well-motivated, well-led, has access to appropriate opportunities for training and skills development, are diverse and is engaged in decision making. Within the technical section of the tender, suppliers were assessed on their approach to Fair Work First and payment of the Real Living Wage to their workforce. Of the 10 recommended suppliers, 4 are an accredited Real Living Wage employer, 1 is paying the Real Living Wage but not accredited however commits to gain accreditation within the initial 2 years of the framework, 3 are currently paying the Real Living Wage but not accredited and 1 is not currently paying the Real Living Wage however commits to paying it within the initial 2 years of the framework as detailed in Appendix 2 – Scoring and Recommendations. Swansons Fruit Company Limited is not currently an accredited Real Living Wage employer and does not pay the Real Living Wage to all employees.

Scotland Excel will continue to monitor Fair Work First, including encouraging further uptake by suppliers committing to paying staff the Real Living Wage, during contract and supplier management activity.

## **7. Contract Mobilisation and Management**

As part of the mobilisation process, the supplier will be offered a contract mobilisation meeting to outline the operation of the framework, including roles and responsibilities, management information and community benefit commitments. The Supplier and participating members will be issued with a mobilisation pack containing all required details to utilise the framework.

In accordance with Scotland Excel's established contract segmentation tool, this framework is classified as class D. As such, it will require an annual supplier meeting and survey, and annual user group reviews as appropriate.

## **8. Summary**

This second-generation framework for the Supply and Distribution of Fresh Fruit & Vegetables continues to maximise collaboration, promote added value, and deliver best value. A range of benefits can be reported in relation to price stability, sustainability, and community benefits.

The Executive Sub Committee is requested to approve the recommendation to award this framework agreement as detailed in Appendix 2.

**Appendix 1 – Participation, Spend and Savings Summary  
Supply & Distribution of Fresh Fruit & Vegetables 0823**

Member Name	Participation in Contract	Participation Entry Date	Estimated Annual Spend (£)	Source of Spend Data	Indexation (%)	% Estimated Forecast Savings	Estimated Annual Savings (£)	Basis of Savings Calculation
Aberdeen City Council	Yes	01 June 2024	£440,000.00	Council Confirmed	10.0%	7.2%	£31,636	Benchmark Current Contract
Aberdeenshire Council	Yes	01 June 2024	£690,000.00	Council Confirmed	10.0%	7.2%	£49,611	Benchmark Current Contract
Angus Council	Yes	01 June 2024	£31,044.00	Council Confirmed	10.0%	7.2%	£2,232	Benchmark Current Contract
Argyll & Bute Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
City of Edinburgh Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
Clackmannanshire Council	TBC	01 June 2024	£1,178.57	MI Confirmed	10.0%	7.2%	£85	Benchmark Current Contract
Comhairle nan Eilean Siar	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
Dumfries & Galloway Council	TBC	01 June 2024	£0.00	MI Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
Dundee City Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
East Ayrshire Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
East Dunbartonshire Council	Yes	01 June 2024	£196,518.00	Council Confirmed	10.0%	7.2%	£14,130	Benchmark Current Contract
East Lothian Council	Yes	01 June 2024	£416,000.00	Council Confirmed	10.0%	7.2%	£29,910	Benchmark Current Contract
East Renfrewshire Council	Yes	01 June 2024	£184,206.00	Council Confirmed	10.0%	7.2%	£13,244	Benchmark Current Contract
Falkirk Council	Yes	01 June 2024	£159,235.72	Council Confirmed	10.0%	7.2%	£11,449	Benchmark Current Contract
Fife Council	Yes	01 June 2024	£700,000.00	Council Confirmed	10.0%	7.2%	£50,330	Benchmark Current Contract
Glasgow City Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
Highland Council	Yes	01 June 2024	£500,000.00	Council Confirmed	10.0%	7.2%	£35,950	Benchmark Current Contract
Inverclyde Council	Yes	01 June 2024	£133,040.60	Council Confirmed	10.0%	7.2%	£9,566	Benchmark Current Contract
Midlothian Council	Yes	01 June 2024	£248,875.77	Council Confirmed	10.0%	7.2%	£17,894	Benchmark Current Contract
Moray Council	Yes	01 June 2024	£239,000.00	Council Confirmed	10.0%	7.2%	£17,184	Benchmark Current Contract
North Ayrshire Council	TBC	01 June 2024	£373,222.83	MI Confirmed	10.0%	7.2%	£26,835	Benchmark Current Contract
North Lanarkshire Council	Yes	01 June 2024	£506,219.90	Council Confirmed	10.0%	7.2%	£36,397	Benchmark Current Contract
Orkney Islands Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
Perth & Kinross Council	Yes	01 June 2024	£17,163.47	Council Confirmed	10.0%	7.2%	£1,234	Benchmark Current Contract
Renfrewshire Council	TBC	01 June 2024	£107,984.53	MI Confirmed	10.0%	7.2%	£7,764	Benchmark Current Contract
Scottish Borders Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
Shetland Islands Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
South Ayrshire Council	Yes	01 June 2024	£200,000.00	Council Confirmed	10.0%	7.2%	£14,380	Benchmark Current Contract
South Lanarkshire Council	Yes	01 June 2024	£600,000.00	Council Confirmed	10.0%	7.2%	£43,140	Benchmark Current Contract
Stirling Council	No	01 June 2024	£0.00	Council Confirmed	10.0%	7.2%	£0	Benchmark Current Contract
West Dunbartonshire Council	Yes	01 June 2024	90,000.00	Council Confirmed	10.0%	7.2%	£6,471	Benchmark Current Contract
West Lothian Council	TBC	01 June 2024	£606,275.36	MI Confirmed	10.0%	7.2%	£43,591	Benchmark Current Contract
Tayside Contracts	Yes	01 June 2024	£485,195.50	Council Confirmed	10.0%	7.2%	£34,886	Benchmark Current Contract
<b>Totals</b>			<b>£6,925,160</b>			<b>7.2%</b>	<b>£497,919</b>	
Associate Members		01 June 2024		MI Confirmed	10.0%		£0	Benchmark Current Contract
<b>Totals</b>			<b>£6,925,160</b>			<b>7.2%</b>	<b>£497,919</b>	

Asterisk (\*) denotes TBC

Indexation – This column confirms the difference when the relevant market indices are compared with the relevant Contract indices derived from framework specific cost drivers.

## Appendix 2 – Scoring and Recommendations

<u>LOT NAME</u>	<u>TENDERER NAME</u>	<u>SME STATUS</u>	<u>REAL LIVING WAGE STATUS</u>	<u>LOCATION</u>	<u>OVERALL RECOMMENDATION STATUS</u>	<u>COMMERCIAL SCORE</u>	<u>TOTAL TECHNICAL SCORE</u>	<u>TOTAL SCORE</u>	<u>PLACING</u>	<u>RECOMMENDED FOR AWARD</u>
Fresh Fruit & Vegetables	George Carruthers & Sons Limited	Small	1	Glasgow	SUCCESSFUL	75.00	25.00	100.00	1	Y
Fresh Fruit & Vegetables	George Anderson & Sons	Medium	1	Edinburgh	SUCCESSFUL	69.46	24.50	93.96	2	Y
Fresh Fruit & Vegetables	Mclays Limited	Medium	1	Glasgow	SUCCESSFUL	65.12	24.50	89.62	3	Y
Fresh Fruit & Vegetables	Failte Food Service Limited	Medium	1	Glasgow	SUCCESSFUL	62.74	24.25	86.99	4	Y
Fresh Fruit & Vegetables	Premier Produce Scotland Ltd	Small	3	Glasgow	SUCCESSFUL	59.71	22.50	82.21	5	Y
Fresh Fruit & Vegetables	Brake Bros Limited	Large	4	Kent	SUCCESSFUL	53.38	24.50	77.88	6	Y
Fresh Fruit & Vegetables	T.P.S. Fruit & Vegetables Limited	Small	5	Aberdeenshire	SUCCESSFUL	56.66	16.75	73.41	7	Y
Fresh Fruit & Vegetables	Dole Limited t/a Mark Murphy	Medium	4	Edinburgh	SUCCESSFUL	53.10	16.00	69.10	8	Y
Fresh Fruit & Vegetables	J Halbert t/a Fruits & Roots	Micro	4	Troon	SUCCESSFUL	41.88	14.25	56.13	9	Y
Fresh Fruit & Vegetables	Swansons Fruit Company Limited	Small	6	Inverness	SUCCESSFUL	31.54	24.25	55.79	10	Y

**KEY – Real Living Wage Status Reference and Descriptions**

Real Living Wage Ref.	Description
1	<p><b>Paying and Accredited</b></p> <p>Accredited Real Living Wage Employer and commit to maintaining this for the duration of the Framework Contract.</p>
2	<p><b>Paying &amp; Progressing to Accreditation</b></p> <p>Currently Paying the Real Living Wage and going through the process of becoming an accredited Real Living Wage Employer. Commitment to gaining accreditation over the initial two-year period of the Framework Contract.</p>
3	<p><b>Paying &amp; Commitment to Accreditation</b></p> <p>Currently paying the Real Living Wage. Not yet progressing accreditation but commitment to gaining accreditation over the initial two-year period of the framework contract.</p>
4	<p><b>Paying but No Commitment to Accreditation</b></p> <p>Currently paying the Real Living Wage. Not an accredited Real Living Wage Employer but paying the Real Living Wage to all employees (except volunteers, apprentices, and interns) and commit to maintaining this for the duration of the framework contract.</p>
5	<p><b>Not Paying but Commitment to Pay</b></p> <p>Not an accredited Real Living Wage Employer and do not currently pay the Real Living Wage to all employees (except volunteers, apprentices, and interns) but commit to paying the Real Living Wage to all employees (except volunteers, apprentices, and interns) within the initial two-year period of the framework contract.</p>
6	<p><b>Not Paying</b></p> <p>Neither accredited nor paying Real Living Wage.</p>



## **Scotland Excel**

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

**Tender: Supply Delivery Maintenance and Repair of Cleaning Equipment**

**Schedule: 05/23**

**Period: An initial period of 36 Months from commencement date with an option to extend for a single twelve-month period**

### **1. Introduction and Background**

This recommendation is for the award of the second-generation renewal framework for the Supply Delivery Maintenance and Repair of Cleaning Equipment.

This framework will provide a mechanism for councils to procure a range of cleaning equipment which will include, but is not limited to, floor sweepers, scrubbers, vacuum cleaners, and associated products.

This framework was advertised for a period of up to 48 months, comprising an initial period of 36 months from the commencement date with an option to extend for a single 12-month period subject to satisfactory operation and performance. Subject to approval and completion of a standstill period, the framework is intended to commence on or around early May 2024.

The report summarises the outcome of the procurement process for this national framework agreement and presents recommendations for award.

### **2. Scope, Participation and Spend**

As part of the strategy development and through consultation with the Commercial User Intelligence Group Steering Group (CUIG-SG), the inclusion of two lots was endorsed as shown in Table 1. The framework structure remains unchanged from the previous generation of the framework.

**Table 1: Lotting Structure**

<b>Lot No.</b>	<b>Description</b>	<b>Estimated % Spend through lot</b>
1	Supply & Delivery of Cleaning Equipment & Associated Products	90%
2	Maintenance & Repair of Cleaning Equipment & Associated Products	10%

As detailed in Appendix 1, 27 councils plus Tayside Contracts have confirmed their intention to participate in this framework, with all councils included in the advertised contract notice.

The framework was advertised at a total value of £1 million per annum, which equates to an estimated spend of £4 million over the maximum 4-year term of the framework. This advertised spend allows for increased participation from council and associate members not currently utilising the framework.

### **3. Procurement Process**

A Prior Information Notice (PIN) was published on the 22nd February 2023 which resulted in expressions of interest from 21 suppliers.

Thereafter, the contract notice was published via the Find a Tender and Public Contracts Scotland (PCS) portal on the 11th January 2024, with the tender documentation being immediately available via the Public Contracts Scotland Tender (PCS-T) system. The tender exercise was conducted and concluded in accordance with the law and procedures currently in force.

The procurement exercise followed an open tender procedure to encourage maximum competition.

The published tender documents anticipated the appointment to the framework of tenderers with relevant and demonstrable experience and capabilities. There was no fixed number of tenderers to be awarded participation and no fixed score ensured success. The most economically advantageous tenderer or tenderers were identified once all of the bids had undergone evaluation in accordance with the requirements set down within the tender documents.

The tender followed a two-stage evaluation process conducted concurrently. Stage one, Qualification, was conducted using the Single Procurement Document (SPD). Within the SPD, tenderers were required to answer a set of exclusionary questions along with providing details and/or acknowledgement of insurance, financial standing, quality management, health and safety, and environmental management policies and/or procedures.

At the second stage of the evaluation process, offers were evaluated against the award criteria and weightings outlined in Table 2.



**Table 2: Evaluation Criteria/Weighting – Lot 1 and Lot 2**

<b>Award Criteria</b>	<b>Total Available Scores</b>
Commercial Section	80
Technical Section	20

Tenderers were required to indicate which local authorities they had an ability to service.

- In the Commercial Section, for lot 1, tenderers were asked to offer a National Net Delivered Product Price for at least 50% of a basket of goods. For lot 2 tenderers were asked to enter its “National Rate” for all engineer costs listed in the Schedule of Offer. For lot 1, tenderers were also asked to submit pricing for additional products, which prices were not scored, but have contractual effect. For lot 2, tenderers were also asked to submit mileage rates, which were not scored, but have contractual effect.
- In the Technical Section, as outlined in Table 3, by the evaluation of scored method statements taking the form of a single response from each tenderer on: Contract Management and Customer Service, Sustainability, Fair Work First and Community Benefits. A number of unscored technical requirements were also applied to tenderers relative to Ability to Service, Restrictions on Ability to Service, Ability to Transact, Vehicle Environmental Standards and Real Living Wage which have contractual effect.

**Table 3: Method Statement Scoring**

<b>Section</b>	<b>Question</b>	<b>Maximum Score Available</b>
<b>Technical 20%</b>	<b>MS1- Contract Management and Customer Service</b>	<b>5</b>
	<i>1.1 Contract Management</i>	<i>2.5</i>
	<i>1.2 Customer Service</i>	<i>2.5</i>
	<b>MS2 - Sustainability</b>	<b>5</b>
	<i>2.1 Waste</i>	<i>2</i>
	<i>2.2 Transportation</i>	<i>2</i>
	<i>2.3 Supply Chain</i>	<i>1</i>
	<b>MS3 - Fair Work First</b>	<b>5</b>
	<b>MS4 - Community Benefits</b>	<b>5</b>

Following a full evaluation of all submissions, scoring was completed in accordance with the published tender evaluation methodology, and a score was calculated for each tenderer.

#### **4. Report on Offers Received**

The tender documents were downloaded by 25 suppliers, with 13 tender responses received by the specified closing date and time.

Based on the criteria and scoring methodology set out in the tender documents, a full evaluation of offers received was completed. A summary of all the offers received and the scoring achieved by each tenderer is set out in Appendix 2.

#### **5. Recommendations**

Based on the evaluation undertaken, and in line with the advertised criteria and weightings summarised above, it is recommended that a multi-supplier framework arrangement is awarded (in whole or in part) to 3 suppliers as outlined in Appendix 2 subject to satisfactory conclusion of insurance checks.

The 3 recommended suppliers offer best value and represent a mix of small and medium organisations.

The range of suppliers recommended provides coverage and competitive options for all participating bodies.

The Executive Sub Committee is accordingly requested to approve the recommendation to award this framework as detailed within Appendix 2.

#### **6. Benefits**

##### **Savings**

Scotland Excel has conducted a benchmarking exercise comparing current pricing against the pricing submitted within the renewal tender. The result of this benchmarking is listed in Appendix 1. The projected average on cost across all councils is 11%, which equates to an estimated total increase of approximately £60,740 per annum based on current forecast spend levels. Given the market movement forecast of 11% over the period of the current framework as demonstrated in figure 1, the impact through transition to the new framework is cost neutral.

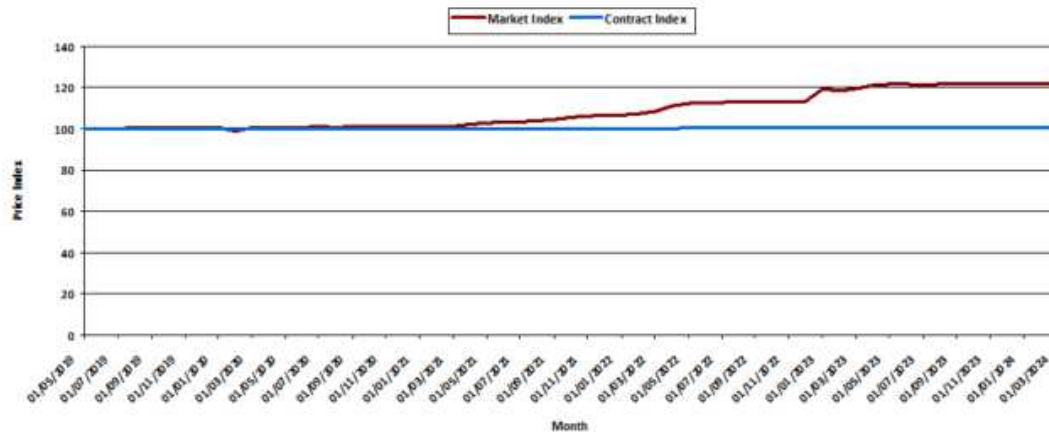


Figure 1 Indexation Report March 2024

These savings are summarised in Table 4 in accordance with the Scottish Government procurement benefits reporting guidance.

Table 4: Benefit Types

Reference	Type	Reportable Outcome
BT1	Direct price-based savings	£60,740
BT2	Price versus market savings	11%
BT3	Process savings from use of collaborative arrangements	£337,000

### Price Stability

Pricing is fixed for the first 12-months of the framework. Thereafter, all requests for price increases will be evaluated according to the Terms and Conditions of the framework and require to be supported by documentary evidence.

After the first 12-months, suppliers may submit a request for a price variance on an annual basis. Suppliers may submit a price decrease at any time throughout the duration of the framework.

### Rebate

A rebate of 0.5% payable to Scotland Excel will be applied to framework spend above £75,000 annually and will be calculated based on all frameworks spend

with the supplier reported through management information returns. It is important to note that the £75,000 threshold resets annually.

## **Sustainable Procurement Benefits**

The following sustainability benefits represent the Scottish Government reporting guidance for sustainability-based benefits (BT14).

Within the technical section of the tender, Scotland Excel included a sustainability related method statement, which included questions related to the following areas:

- Waste
- Transportation
- Supply Chain

Responses received as part of the tender exercise are summarised, below:

In terms of waste, suppliers are seeking advice from specialist consultants as and when required regarding management of waste to maintain a Reduce, Reuse and Recycle culture.

Suppliers are using effective route management to monitor journey routing, and fuel efficiency. Electric vehicles are also being considered as technology improves.

Suppliers are using environmental policies to address their carbon footprint and to seek innovation on new products from their own supply chain.

## **Community Benefits**

Scotland Excel is committed to maximising community benefits delivery for members. Suppliers were asked to commit to the delivery of community benefit initiatives, against pre-agreed spend thresholds outlined within the community benefits method statement. These aim to be reflective of the National Indicators outlined within the Scottish Government's National Performance framework, and their underlying vision and goals. Councils will accrue 'community benefit points' based on their level of spending with a supplier. These 'points' correlate to a negotiable benefit that the council can elect to receive at any given point throughout the lifetime of the framework. Of the recommended suppliers, all 3 have committed to delivering these benefits. Scotland Excel will continue to engage with all appointed suppliers to drive maximum adoption and delivery of community benefits where appropriate.

Within the published tender documents, suppliers were given a list of indicative community benefits that could be agreed with councils. Examples of these are:

- Fundraising (Events in the local authority area for charity)
- Community Volunteering (Community Projects e.g., food growing/allotment assistance)

- Work Experience (Placements for school students in the local authority)
- Training (Training sessions for wider community)
- Employability Workshops (Events in school, college, or community group)
- Material/Labour Donation (Help support community projects)
- Sponsorship (Local sports team or community event)

Scotland Excel will monitor delivery of these commitments during the lifetime of the framework, and this will also be reported through ongoing contract management returns.

### **Fair Work First Including the Real Living Wage**

Scotland Excel and its members are committed to the delivery of high-quality public services and recognise that this is dependent on a workforce that is well-rewarded, well-motivated, well-led, has access to appropriate opportunities for training and skills development, are diverse and is engaged in decision making. Within the technical section of the tender, suppliers were assessed on their approach to Fair Work First and payment of the Real Living Wage to their workforce. Of the 3 recommended suppliers, all 3 pay the Real Living Wage with one being an accredited Real Living Wage employer, as detailed in Appendix 2 – Scoring and Recommendations.

Scotland Excel will continue to monitor Fair Work First, including encouraging further uptake by suppliers to gain Real Living Wage accreditation during contract and supplier management activity.

## **7. Contract Mobilisation and Management**

As part of the mobilisation process, all suppliers will be offered a contract mobilisation meeting to outline the operation of the framework, including roles and responsibilities, management information and community benefit commitments. Suppliers and participating members will be issued with a mobilisation pack containing all required details to utilise the framework.

In accordance with Scotland Excel's established contract classification tool, this framework is classified as class D. As such, it will require annual supplier meetings and surveys, and annual user group reviews as appropriate. During the current market conditions Scotland Excel will continue to engage with suppliers on a regular basis to manage the response to the pandemic and ensure continuity of this essential service delivery for members.

## **8. Summary**

This second-generation framework for the Supply Delivery Maintenance and Repair of Cleaning Equipment continues to maximise collaboration, promote added value, and deliver best value. A range of benefits can be reported in relation to savings, price stability, sustainability, and community benefits.

The Executive Sub Committee is requested to approve the recommendation to award this framework agreement as detailed in Appendix 2.

**Appendix 1 – Participation, Spend and Savings Summary**  
**0523 Supply Delivery Maintenance and Repair of Cleaning Equipment**

Member Name	Participation in Contract	Participation Entry Date	Estimated Annual Spend (£)	Source of Spend Data	Indexation (%)	% Estimated Forecast Savings	Estimated Annual Savings (£)	Basis of Savings Calculation
Aberdeen City Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Aberdeenshire Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Angus Council	YES	May 2024	£392	MI Confirmed	11.0%	-11.0%	-£43	Benchmark Current Contract
Argyll & Bute Council	YES	May 2024	£9,634	MI Confirmed	11.0%	-11.0%	-£1,060	Benchmark Current Contract
City of Edinburgh Council	YES	May 2024	£94,543	MI Confirmed	11.0%	-11.0%	-£10,400	Benchmark Current Contract
Clackmannanshire Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Comhairle nan Eilean Siar	NO	May 2024	£992	MI Confirmed	11.0%	-11.0%	-£109	Benchmark Current Contract
Dumfries & Galloway Council	YES	May 2024	£2,343	MI Confirmed	11.0%	-11.0%	-£258	Benchmark Current Contract
Dundee City Council	TBC	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
East Ayrshire Council	YES	May 2024	£32,947	MI Confirmed	11.0%	-11.0%	-£3,624	Benchmark Current Contract
East Dunbartonshire Council	YES	May 2024	£21,644	MI Confirmed	11.0%	-11.0%	-£2,381	Benchmark Current Contract
East Lothian Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
East Renfrewshire Council	YES	May 2024	£25,151	MI Confirmed	11.0%	-11.0%	-£2,767	Benchmark Current Contract
Falkirk Council	YES	May 2024	£11,960	MI Confirmed	11.0%	-11.0%	-£1,316	Benchmark Current Contract
Fife Council	YES	May 2024	£1,024	MI Confirmed	11.0%	-11.0%	-£113	Benchmark Current Contract
Glasgow City Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Highland Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Inverclyde Council	YES	May 2024	£192	MI Confirmed	11.0%	-11.0%	-£21	Benchmark Current Contract
Midlothian Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Moray Council	TBC	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
North Ayrshire Council	YES	May 2024	£25,986	MI Confirmed	11.0%	-11.0%	-£2,858	Benchmark Current Contract
North Lanarkshire Council	YES	May 2024	£91,890	MI Confirmed	11.0%	-11.0%	-£10,108	Benchmark Current Contract
Orkney Islands Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
Perth & Kinross Council	NO	May 2024	£479	MI Confirmed	11.0%	-11.0%	-£53	Benchmark Current Contract
Renfrewshire Council	YES	May 2024	£4,921	MI Confirmed	11.0%	-11.0%	-£541	Benchmark Current Contract
Scottish Borders Council	YES	May 2024	£1,124	MI Confirmed	11.0%	-11.0%	-£124	Benchmark Current Contract
Shetland Islands Council	YES	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
South Ayrshire Council	YES	May 2024	£38,446	MI Confirmed	11.0%	-11.0%	-£4,229	Benchmark Current Contract
South Lanarkshire Council	YES	May 2024	£95,695	MI Confirmed	11.0%	-11.0%	-£10,526	Benchmark Current Contract
Stirling Council	TBC	May 2024	£0	MI Confirmed	11.0%	-11.0%	£0	Benchmark Current Contract
West Dunbartonshire Council	YES	May 2024	£23,560	MI Confirmed	11.0%	-11.0%	-£2,592	Benchmark Current Contract
West Lothian Council	YES	May 2024	£2,860	MI Confirmed	11.0%	-11.0%	-£315	Benchmark Current Contract
Tayside Contracts	YES	May 2024	£4,935	MI Confirmed	11.0%	-11.0%	-£543	Benchmark Current Contract
<b>Totals</b>			<b>£490,718</b>			<b>-11.0%</b>	<b>-£53,979</b>	
Associate Members	YES	May 2024	£61,467	MI Confirmed	11.0%	-11.0%	-£6,761	Benchmark Current Contract
<b>Totals</b>			<b>£552,185</b>			<b>-11.0%</b>	<b>-£60,740</b>	

Indexation – This column confirms the difference when the relevant market indices are compared with the relevant Contract indices derived from framework specific cost drivers.

## Appendix 2 – Scoring and Recommendations

<u>LOT NUMBER AND NAME</u>	<u>TENDERER NAME</u>	<u>SME STATUS</u>	<u>REAL LIVING WAGE STATUS</u>	<u>LOCATION</u>	<u>NUMBER OF LOTS BID FOR</u>	<u>NUMBER OF LOTS RECOMMENDED</u>	<u>OVERALL RECOMMENDATION STATUS</u>	<u>COMMERCIAL SCORE</u>	<u>TOTAL TECHNICAL SCORE</u>	<u>TOTAL SCORE</u>	<u>PLACING</u>	<u>RECOMMENDED FOR AWARD FOR LOT/SUB-LOT?</u>
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	DMG FLOORCARE LTD	Small	1	Glasgow	2	2	SUCCESSFUL	80.00	18.50	98.50	1	Y
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	HIGHLAND INDUSTRIAL SUPPLIES LIMITED	Medium	4	Inverness	2	1	PART-SUCCESSFUL	76.88	20.00	96.88	2	Y
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	NILFISK LTD.	Medium	4	Cumbria	2	1	PART-SUCCESSFUL	79.95	16.38	96.32	3	Y
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	IIC PRODUCTS LIMITED	Small	3	Birmingham	2	0	UNSUCCESSFUL	60.01	20.00	80.01	4	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	NUMATIC INTERNATIONAL LIMITED	Large	4	Chard	2	0	UNSUCCESSFUL	59.21	19.38	78.58	5	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	UNICO LIMITED	Medium	1	Falkirk	1	0	UNSUCCESSFUL	56.65	20.00	76.65	6	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	BUNZL UK LIMITED	Large	4	London	2	0	UNSUCCESSFUL	56.62	17.00	73.62	7	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	DIVERSEY LIMITED	Large	4	Northampton	1	0	UNSUCCESSFUL	50.89	20.00	70.89	8	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	CAPITAL POWER CLEAN LIMITED	Small	2	Livingston	2	0	UNSUCCESSFUL	48.85	20.00	68.85	9	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	ALLIANCE DISPOSABLES LIMITED	Medium	2	Glasgow	1	0	UNSUCCESSFUL	48.75	20.00	68.75	10	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	GT CLEANING MACHINES LIMITED	Small	4	East Kilbride	2	0	UNSUCCESSFUL	47.69	17.50	65.19	11	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	POWERWASHER SERVICES LIMITED	Small	1	Laurencekirk	2	0	UNSUCCESSFUL	41.06	17.63	58.69	12	N
Lot 1 - Supply & Delivery of Cleaning Equipment & Associated Products	BRIGGS EQUIPMENT UK LIMITED	Large	6	Cannock	2	0	UNSUCCESSFUL	38.26	19.00	57.26	13	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	DMG FLOORCARE LTD	Small	1	Glasgow	2	2	SUCCESSFUL	80.00	18.50	98.50	1	Y
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	NUMATIC INTERNATIONAL LIMITED	Large	4	Chard	2	0	UNSUCCESSFUL	53.33	19.38	72.71	2	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	CAPITAL POWER CLEAN LIMITED	Small	2	Livingston	2	0	UNSUCCESSFUL	44.60	20.00	64.60	3	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	POWERWASHER SERVICES LIMITED	Small	1	Laurencekirk	2	0	UNSUCCESSFUL	39.53	17.63	57.15	4	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	HIGHLAND INDUSTRIAL SUPPLIES LIMITED	Medium	4	Inverness	2	1	PART-SUCCESSFUL	32.00	20.00	52.00	5	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	GT CLEANING MACHINES LIMITED	Small	4	East Kilbride	2	0	UNSUCCESSFUL	26.25	17.50	43.75	6	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	BUNZL UK LIMITED	Large	4	London	2	0	UNSUCCESSFUL	26.53	17.00	43.53	7	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	IIC PRODUCTS LIMITED	Small	3	Birmingham	2	0	UNSUCCESSFUL	11.72	20.00	31.72	8	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	BRIGGS EQUIPMENT UK LIMITED	Large	6	Cannock	2	0	UNSUCCESSFUL	12.29	19.00	31.29	9	N
Lot 2 - Maintenance & Repair of Cleaning Equipment & Associated Products	NILFISK LTD.	Medium	4	Cumbria	2	1	PART-SUCCESSFUL	12.80	16.38	29.17	10	N



**KEY** – Real Living Wage Status Reference and Descriptions

Real Living Wage Ref.	Description
1	<p><b>Paying and Accredited</b></p> <p>Accredited Real Living Wage Employer and commit to maintaining this for the duration of the Framework Contract.</p>
2	<p><b>Paying &amp; Progressing to Accreditation</b></p> <p>Currently Paying the Real Living Wage and going through the process of becoming an accredited Real Living Wage Employer. Commitment to gaining accreditation over the initial two-year period of the Framework Contract.</p>
3	<p><b>Paying &amp; Commitment to Accreditation</b></p> <p>Currently paying the Real Living Wage. Not yet progressing accreditation but commitment to gaining accreditation over the initial two-year period of the framework contract.</p>
4	<p><b>Paying but No Commitment to Accreditation</b></p> <p>Currently paying the Real Living Wage. Not an accredited Real Living Wage Employer but paying the Real Living Wage to all employees (except volunteers, apprentices, and interns) and commit to maintaining this for the duration of the framework contract.</p>
5	<p><b>Not Paying but Commitment to Pay</b></p> <p>Not an accredited Real Living Wage Employer and do not currently pay the Real Living Wage to all employees (except volunteers, apprentices, and interns) but commit to paying the Real Living Wage to all employees (except volunteers, apprentices, and interns) within the initial two-year period of the framework contract.</p>
6	<p><b>Not Paying</b></p> <p>Neither accredited nor paying Real Living Wage.</p>



## Scotland Excel

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

### **Request for Associate Membership of Scotland Excel by The National Records of Scotland**

#### **1. Background**

- 1.1 Scotland Excel operates an Associate programme to allow access to its frameworks and services to a wide range of other public service orientated bodies. Applications can be made for Associate Membership by organisations such as council arm's length organisations, community groups, charities, housing associations and voluntary organisations which are a public body or a body that engages in activities of a public nature.

Organisations apply to Scotland Excel for Associate Membership to allow them to access the frameworks for goods and services which are in place for our members. Associates do not have the opportunity to influence the future contract delivery schedule which is reserved for the full local authority members.

Associate membership supports the wider aims of Scotland Excel by increasing overall spend against frameworks, providing additional income and supporting the goals of promoting excellent public procurement across Scottish organisations.

#### **2. Organisation Background**

- 2.1 The National Records of Scotland is a Non-Ministerial Department of the Scottish Government. The purpose of The National Records of Scotland is to collect, preserve and produce information about Scotland's people and history and make it available to inform current and future generations.

The National Records of Scotland was established on 1 April 2011, following the merger of the General Register Office for Scotland (GROS) and the National Archives of Scotland (NAS).

- 2.2 The National Records of Scotland is an accredited real living wage employer.

## **Associate Membership Process**

- 3.1 Before any application is submitted for approval, a number of validation checks on the organisation are carried out. These include a review of the Memorandum & Articles of Association, the financial position and the type of contracts that the organisation is likely to access. It is confirmed that satisfactory validation checks have been completed in relation to this application.
- 3.2 Scotland Excel monitors all requests from applicants to become associate members to ensure that any legal requirements are met. In this case, The National Records of Scotland can be recommended for associate membership access in accordance with the Local Authorities (Goods and Services) Act 1970 section 1 (1B)(b) as a public authority or body.

- 3.3 Fees are determined in a number of ways:

Arms Length External Organisations (ALEOs) related to local authority members pay no fee as this is covered within requisition fees.

National Health Service (NHS) bodies, Colleges and Universities, and Non departmental bodies of the Scottish Government pay no fee under a reciprocal agreement that allows local authorities to utilise contracts created by the relevant procurement centres of expertise.

All other associate fees are calculated on a standard methodology agreed by committee. e.g. Housing Associations pay based on the number of houses within their portfolio.

## **4. Recommendations**

- 4.1 It is recommended to committee that The National Records of Scotland application to join Scotland Excel as an associate member be approved, with no annual fee as part of the reciprocal agreement and subject to the agreement document.

## Scotland Excel

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

### **Academy Strategy**

#### **1. Introduction**

- 1.1 The purpose of this report is to inform the Executive Sub Committee of the new strategy for the Scotland Excel Academy for 2024 to 2026. The Academy 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 8<sup>th</sup> December 2023.
- 1.2 The Strategy (Appendix 1) has been developed following consultation with Councils and outlines Scotland Excel's vision of, and approach to, maximising the value the Academy can deliver to Councils whilst continuing to adapt to changing needs within the sector.

#### **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 support for people development and organisational development.
- 2.2 Since its creation, The Academy has developed a range of accredited and non-accredited training and development courses, workshops and sessions across Procurement and also in leadership development to support the local government community.
- 2.3 In developing this strategy, it is recognised that there will be difficult choices facing members as they balance affordability with other drivers such as the need to develop a professional procurement community fit to serve the public sector of the future.

### 3. **Adapting and Growing the Academy**

- 3.1 While the new strategy places the developmental requirements of member organisations at its heart, it is also based around strategic growth of the academy and diversifying the range of learning and development opportunities it delivers whilst remaining mindful of the financial landscape in which it operates.
- 3.2 Over the next two years The Academy will continue to deliver its existing comprehensive range of learning and development packages whilst looking at opportunities to diversify and grow.
- 3.3 The academy will launch and deliver a free of charge Commercial Improvement training package specifically designed to help the local government community to make a shift into a more commercial mindset.
- 3.4 In addition, the academy is investigating a social care commissioning training option. Whilst this is the start of a process to satisfy what member organisations suggest is a significant requirement, it will be approached in an incremental manner in partnership with the sector.

### 4. **Recommendation**

- 4.1 Members are asked to provide input and note the Scotland Excel Academy Strategy 2024 – 2026.



# Academy Strategy

01 April 2024 – 31 March 2026

## Introduction

The Scotland Excel Academy was created in 2016 to support people development and organisational development across the Scottish public-sector.

Since its creation The Academy has developed a range of accredited and non-accredited training and development courses, workshops and sessions across the Procurement profession and in management and leadership, to support local government.

When the current strategy was developed, it set out to support local government members further by flexing the approach to learning and skills development. This required further adjustment with the onset of the Covid pandemic with the introduction of shorter online workshops and sessions delivered free of charge.

To provide ongoing learning opportunities during the pandemic, the Academy launched 'Stay Connected', a programme of free online seminars covering a variety of procurement and business topics. The programme now forms part of the Academy's core offering, and more than 1,500 delegates have participated in sessions.

In January 2022, as a result of Scotland Excel's successful bid to deliver the Scottish Government's procurement and commercial training framework, the Academy launched a programme of short courses for procurement practitioners. The programme has been welcomed by members as a cost-effective skills development route for existing practitioners and new entrants to the profession.

The Academy also received funding from the Scottish Government to develop a new course to help procurement professionals identify and manage risks arising from the involvement of serious and organised crime groups in public sector tendering. This course was launched at a free seminar in October 2022 attended by more than 200 delegates, this was then followed up in March 2024 with updated webinar with 250 attendees.

However, there will always be a need for the academy to change and adapt considering the financial challenges the sector faces and following extensive engagement with stakeholders, the focus of this strategy is on the need to develop and deliver more cost-effective development packages which, in the long term, achieve the same development needs. In developing this strategy, the Academy has recognised that there will be difficult choices facing members as they balance affordability with other drivers such as the need to develop a community fit to serve the public sector of the future.



The Academy's vision over the term of this strategy is:

***The Academy will be the centre for Learning and Development for the local government sector, becoming the thought leaders for procurement in the public sector. It will seek to become the leading provider of work-based-learning nationally across the Scottish public sector, enabling our people to tackle the opportunities and challenges of today and tomorrow.***

## **Strategy**

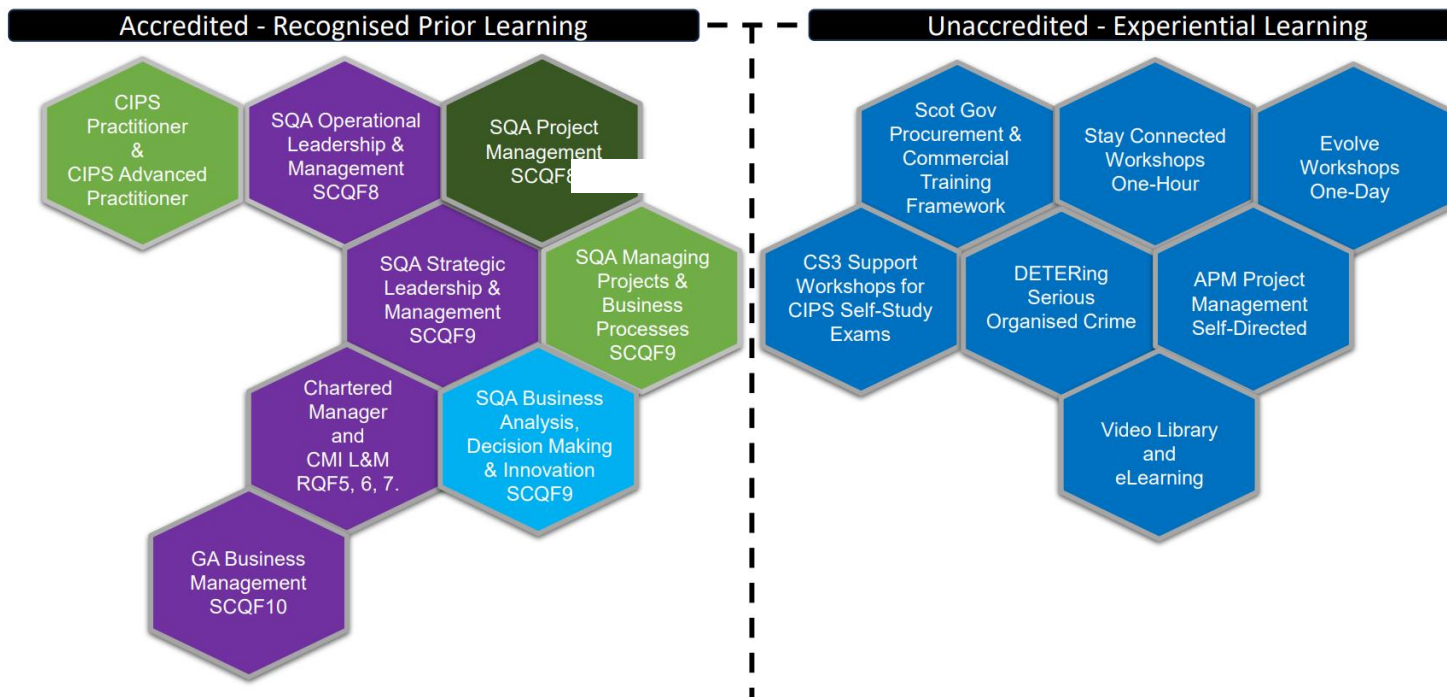
While the strategy places the developmental requirements of members at its heart, it has also been based around strategic growth of the Academy and diversifying the range of learning and development opportunities it delivers whilst always remaining mindful of the financial landscape in which it operates.

Over the next two years the Academy will continue to deliver its existing comprehensive range of learning and development packages whilst looking at opportunities to diversify and grow.

Initially in year one of this strategy the Academy will launch and deliver a free of charge to local authorities Commercial Improvement training package. This will be specifically designed to help the community make a shift into a more commercial mindset to understand the drivers within its supply base and where maximum value can be driven through supply chain engagement and strategic contract & supplier management.

In addition, the Academy is investigating a social care commissioning training option. Whilst this is the start of a process to satisfy what appears to be a significant requirement, Scotland Excel will approach this in an incremental manner whilst continuing to design the full package in partnership with the sector whilst working to fully understand demand, costs and funding.

# Current Academy Portfolio



The current full list of training courses and support the Academy offers includes:

### **Procurement**

- Scottish Government Procurement and Commercial Training Framework
- CIPS self-study support Workshops for CIPS Level 4 modules 1-8.
- DETERing Serious Organised Crime workshops, as a 1-day workshop.

### **Project Management**

- Scottish Qualifications Authority (SQA) Professional Development Award (PDA) Project Management Scottish Credit and Qualifications Framework SCQF8.
- Support Licensed APM content learning journey.

### **Business Analysis, Decision Making and Innovation**

- Scottish Qualifications Authority (SQA) Business Analysis unit Scottish Credit and Qualifications Framework SCQF8.
- Scottish Qualifications Authority (SQA) Professional Development Award (PDA) Decision Making and Innovation Scottish Credit and Qualifications Framework SCQF9.

### **Leadership and Management**

- Scottish Qualifications Authority (SQA) Professional Development Award (PDA) Strategic Leadership and Management SCQF9.
- Design, write and deliver Scottish Qualifications Authority (SQA) Professional Development Award (PDA) Operational Leadership and Management Scottish Credit and Qualifications Framework SCQF8.
- Assessment of Chartered Manager (old route)
- Graduate Apprenticeship Business Management Scottish Credit and Qualifications Framework SCQF10.

### **All Disciplines**

- Stay Connected workshops.
- Evolve workshops.
- eLearning projects.

## Commitments

With local government and other public sector bodies facing unprecedented challenges, Scotland Excel remains committed to developing solutions that help members secure affordable frontline services.

While it is too early to say what the future services may look like, it is clear that there may need to be some bold thinking and radical change in how the sector delivers procurement at a national and local level. As the centre of expertise, Scotland Excel will lead the sector in evaluating options, and will be guided by members as to what is appropriate for them at a local level.

The new Academy strategy will be implemented and developed in close consultation with stakeholders to ensure that they are fully designed around their skills needs. Work will continue with the Scottish Government and other partners to develop new co-branded procurement programmes aligned to the national procurement development framework, and which respond to identified skills gaps across the procurement community.

The Academy will also develop and implement procurement and commissioning training programmes for key sectors, such as construction and care, to improve the knowledge and skills of buyers involved in the specification, purchase and delivery of these high value projects and services.

In response to member requests for alternative accredited learning programmes, the Academy will continue to work with the Scottish Qualifications Authority (SQA) to develop programmes which offer high quality, tailored learning opportunities at significantly lower price points than other professional qualifications.

Work will continue to explore opportunities to build a pipeline of public procurement talent. As well as considering the existing Graduate Programme as a pathway for developing new entrants to the sector, work will be undertaken with University Partners on the potential for a new Graduate Apprenticeship (GA) programme in Business Management with Procurement and Supply Chain Management. If implemented, this initiative would offer a free degree development programme to members funded through the Apprenticeship Levy.

In addition to this already comprehensive and well received suite of courses and support, over the term of this two years strategy the academy will look to adapt and grow to ensure it responds to the changing needs of Scotland Excel members and the wider public sector community.

## **Procurement and Commercial**

It is becoming clear that, as a sector, there is a need to become more commercial in ways of working and in dealings with the supply base. This is an area that requires a strategic mindset shift, as well as being supported by tools and templates, how organisations deal with suppliers will help the sector unlock many benefits and innovative practices to further improve and enhance services.

To support this the Academy will also survey as wide a group of stakeholders to determine whether or not the current topics are relevant to the sector. Part of this work will also look to understand the potential market size and look to improve communication and marketing channels to ensure that everything that the Academy does is based on empirical data from members.

In the first year of this strategy the Academy will design and deliver, free of charge to the local authority Procurement community, a suite of people development programmes designed to start the journey to being more commercial as a sector.

In addition to this the Academy will also continue to design and deliver more cost-effective, fit for purpose, work-based-learning programmes contextualised to the Scottish public-sector, codesigned by the Academy, Scottish Procurement and Property Directorate (SPPD) and wider stakeholders. Practitioner and Expert Practitioner will be nationally accredited qualifications and will include the following:

- Design, write and credit rate Scottish Qualifications Authority (SQA) Practitioner Scottish Credit and Qualifications Framework SCQF8 PDF3 – target launch September 2024.
- Design, write and credit rate Scottish Qualifications Authority (SQA) Expert Practitioner Scottish Credit and Qualifications Framework SCQF9 PDF4 – target launch September 2024.
- Design, write and deliver unaccredited Foundation Practitioner Scottish Credit and Qualifications Framework SCQF7 PDF1/2. Commitment and timeline to be confirmed.

## **Procurement Graduate Support**

Identifying and supporting the Procurement talent of the future is critical. Scotland Excel has a long and successful track record in supporting new entrants into the profession and will continue this with a new suite of training courses and support over the term of this strategy.

- Teach on cohort 1 GA Procurement SCQF10 (Business Management with Procurement and Supply Chain Management) – target launch September 2024.
- Deliver an Academy Apprentice Roadshow including a focus on Graduates.
- Design and deliver CIPS self-study support Workshops for CIPS Level 5 modules 1-8 FY2024/25
- Support CIPS Self Study Support
- Placeholder: Design and deliver CIPS self-study support Workshops for CIPS Level 6 modules 1-7 FY2025/26

## **Social Care Commissioning**

For some time the social care community has been suggesting that specifically tailored training and support is required to support skills and experience enhancement. Scotland Excel has a long term successful and important relationships with both the commissioning sector and the social care provider network so is perfectly placed to help design and deliver tailored social care commissioning training and support courses.

Work has already commenced on scoping what this suite of courses may look like and the Academy is currently working to develop a fully costed business case into a Social Care Professional Development Award (PDA) which could, if demand and funding can be assured, begin to be delivered over the second year of this strategy.

However, in the interim, the Academy is looking into the delivery of shorter subject matter specific sessions for the social care commissioning community by working with external experts to deliver these sessions.

To date consultation with 9 councils has identified demand of around 50 places for Social Care PDA and demand was also indicated for Stay Connected and Evolve workshops.

## **Credit Rating Body**

This area has long been identified as another potential benefit and growth area for Scotland Excel, it's members and the wider public sector community. Over the term of this strategy Scotland Excel will scope out whether pursuing becoming a credit rating body is feasible and achievable within existing budget constraints. There is a recognition that this route holds many potential benefits both to the Academy and to its members through being able to fully design, deliver and approve courses and support learners through the entire learning journey without having to use external credit rating bodies that add cost and time to the learning journey.

Over the first year of this strategy a fully costed business case will be developed to understand the entire process, the full costs, including internal staff costs, the timeline, what's involved in maintaining credit rating body status and the full potential benefits of this strategic aim.

### **Project Management**

The Academy will prepare to bid for Scottish Government Project Training Framework for financial years 2026/27 and 2027/28.

### **Change Management**

It is the intention is to add the Scottish Qualifications Authority (SQA) Professional Development award in planning and lead change. The Professional Development Award will offer many benefits for the upskilling of the community including:

- Improving communications around change
- Increased awareness of stakeholder engagement
- Increased awareness of the importance of data in making evidence-based decisions.
- Supporting people through organisational change.

### **Strategic Approach to Academy Growth**

The Scotland Excel Academy will continue to evolve based on the people development needs of the sector. All options will be considered to support the development of public sector procurement talent, from new entrants to seasoned professionals, including accredited learning, short courses, graduate programmes, and apprenticeships.

This strategy has been developed both to deliver on the Scotland Excel Corporate Goal of “Advancement of skills to deliver Scotland’s economic transformation” and to identify how the Academy can achieve growth both in terms of its size and in terms of the range of courses and support it offers. Scotland Excel fully recognises the Academy should not simply be about delivering successful and well received training courses it should be about changing mindsets and, going forward, needs to be flexible to meet current landscape.



## Scotland Excel

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

### **Buy Social Scotland Business Pledge**

#### **1. Introduction**

1.1 This report outlines an opportunity for Scotland Excel to both demonstrate its social value commitment and also increase its visibility within the wider third sector landscape.

#### **2. Background**

2.1 Scotland Excel was approached by Social Enterprise Scotland and invited to be an early adopter of their new “Buy Social Scotland” programme. The programme seeks to:

- Promote the benefit of social and environmental led sustainable procurement.
- Support businesses develop partnerships and value-led supply chains with Scotland’s social enterprise sector.
- Embed innovation, best practice, diversity and social value into supply chains.
- Deliver enhanced value to Scotland’s communities and wider stakeholders.

There is no charge associated with the programme.

#### **3. The Pledge**

3.1 The Buy Social Pledge has 5 key commitments for organisations:

1. Recognise Fair Work principles.
2. Make a commitment towards a Net Zero Policy.
3. Promote Social Enterprises within our own organisation’s procurement and supply chain.
4. Agree to prompt payment to its suppliers.
5. Commit to reporting annual spend with Social Enterprises.

3.2 Scotland Excel already adheres to the first four elements of the pledge through its ongoing operations and also in its wider attitude and support across its portfolio. Item 5 on the pledge would be a new commitment and is similar to the type of information contained within the existing annual procurement report.

#### **4. Benefits**

4.1 Scotland Excel has been tasked to ensure the third sector, which is recognised as a vital part of the public sector supply chain, is supported. Continued efforts over the years have delivered limited traction with associate membership etc. This pledge could provide added visibility within the wider social enterprise sector.

4.2 Scotland Excel is keen to promote the benefits of social enterprise beyond its own operations and would also seek to promote this concept to its members. Other early adopters include Glasgow City Council, City Building and a number of large private construction organisations.

#### **5. Recommendation**

5.1 Members are invited to approve the adoption of the Buy Social Scotland Business Pledge.



## **Scotland Excel**

**To: Executive Sub-Committee**

**On: 19 April 2024**

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

### **Employee Supporting Attendance Report**

#### **1. Introduction and purpose of the report**

- 1.1. In response to the Renfrewshire Council Internal Audit team recommendation, this report on supporting attendance is submitted on a quarterly basis highlighting the absence rate in the organisation. The report also highlights some of the support mechanisms implemented to support staff members.

#### **2. Scotland Excel Absence Management Target**

- 2.1 The Joint Committee has previously agreed that Scotland Excel should work to an absence rate of below 4%. This target aligns Scotland Excel with partner organisations, supports good practice and demonstrates the ongoing commitment to absence management as a key efficiency target.

#### **3. Overview of Attendance**

- 3.1 In line with audit recommendations, the attached report has been prepared for the Executive Sub Committee. The report details:
- Breakdown of current month, last six months and last 12 months absence figures
  - Illustration of 12 months in days
  - Illustration of last 12 months in percentages
- 3.2 The report includes the latest absence details for the 12-month period to March 2024 in which the rate of absence across the organisation has, with one exception, been maintained below the 4% target.
- 3.3 During the reporting period a number of long-term absences have had a significant effect on the percentage absence rate. These reached a peak in September 2023 when the absence rate reached 4.4% as illustrated in

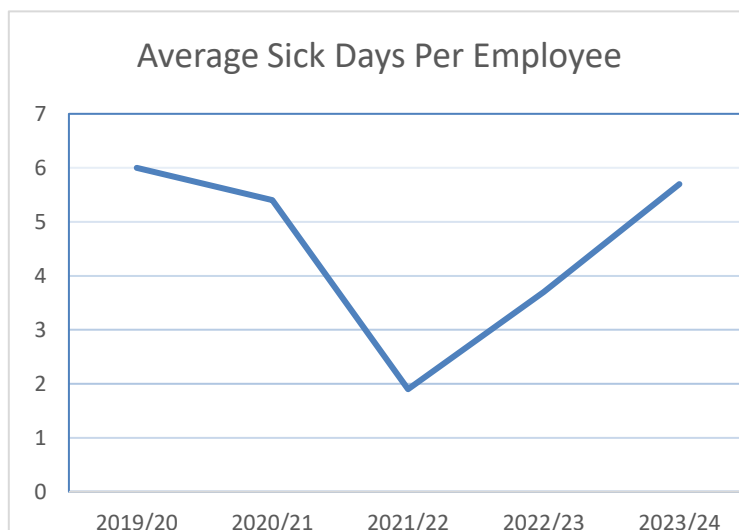
Appendix 1. Overall, however, the reported period shows an average rate of 2.5% which is within the target of 4% with a low of 1.3% recorded in January 2024.

3.4 During this period, short-term absences have been comparatively low with effective, early intervention and supporting attendance procedures put in place to support staff members in maintaining attendance at work.

3.5 Overall, the rolling 6 and 12 month average absence rates have been maintained at or below 2.5%. The absence rates for the reporting periods as shown in appendix 1 are:

- previous 1 month to 1.4% (26 days)
- previous 6 months to 1.8% (211 days)
- previous 12 months to 2.5% (596.5 days)

3.6 The graph below shows average sickness days per employee within Scotland Excel over the past 5 years. Average sickness days reached a peak of 6.0 days per employee in 2019/20 which coincides with a number of long-term absences related to a variety of reasons including COVID. The lowest rate within the reported 5-year period was 1.9 days in 2021/22. The initiatives described below, however, will continue to be utilised to support staff in maintaining attendance at work.



#### 4. Overview of supporting attendance initiatives

4.1 In addition to actively supporting members of staff absent through ill health, Scotland Excel continues to implement positive early intervention practices including working with Occupational Health and other support services to maintain employee attendance and to support members of staff who may be experiencing difficulties while remaining at work. Scotland Excel continues to support a range of interventions for staff including Occupational Health referral, confidential counselling services (Time For Talking), Cognitive Behavioral

Therapy (CBT) sessions, Physiotherapy sessions and, issuing regular wellbeing emails which provide information on health initiatives that can be accessed independently by all staff.

- 4.2 Scotland Excel recognises that positive mental health amongst staff members is an area that should be actively supported and encouraged. In addition to actively promoting good mental health practices and initiatives, the organisation now has 21 members of staff from across all operational areas and grades who have trained as accredited Mental Health First Aiders. In providing this confidential support opportunity to staff members it is hoped that any personal difficulties they may be experiencing can be addressed at an early stage with appropriate signposting to professional support.
- 4.3 In addition to supporting staff members with their mental wellbeing, Scotland Excel is implementing a programme of awareness and support for those who may be experiencing difficulties through menopause. The aim is to raise awareness of the subject across all staff members and put in place measures where those affected feel able to discuss any concerns and can access support. An awareness session is planned for all staff members in mid-April and it is proposed that support groups will be established following this.

## **5. Recommendation**

- 5.1 The Executive Sub Committee is requested to note the contents of this report.

Appendix 1.

