

Scotland Excel

To: Joint Committee

On: 21 June 2024

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

Annual Procurement Report

1. Introduction

The Procurement Reform (Scotland) Act 2014 (the Act) works alongside procurement regulations to provide a national legislative framework for sustainable public procurement.

The purpose of the Act is to support Scotland's economic growth through improved procurement practice. The Act focuses on a small number of general duties on contracting authorities regarding their procurement activities and some specific measures aimed at promoting good, transparent and consistent practice.

Since the introduction of the Act public bodies with an estimated procurement spend of £5 million or more must publish an annual procurement strategy (or a published revision of the previous strategy) and an annual procurement report. The Act sets out what, as a minimum, each annual procurement report must contain. Scotland Excel is not obligated to produce an annual report, it is prepared and submitted on a voluntary basis, providing evidence of good practice carried out through collaboration in Scotland's public sector.

The annual procurement report sets out relevant and proportionate information to provide transparency of purchasing activities in the preceding financial year. The report must be published as soon as reasonably practicable after the end of the financial year, which for Scotland Excel was 31 March 2024.

The statutory guidance on the publication of an annual procurement report states that it must address all matters contained in an organisation's procurement strategy.

2. Annual Reporting on Procurement in Scotland

The 2014 Act also requires Scottish Ministers to publish an annual report on procurement activity in Scotland. It provides a collated overview of public procurement activity and is informed by the individual annual procurement reports published by contracting authorities in Scotland.

Annual procurement reports are expected to be published no later than six months following the end of the contracting authority's financial year. For Scotland Excel this means the annual procurement report for the financial year 2023/24 should be published no later than the end of September 2024, subject to approval from this committee.

The Scotland Excel annual report will then be considered along with those of other public bodies subject to this requirement and be included in the overview when the Scottish Ministers produce the national report.

3. Legislative Requirements

The Procurement Reform (Scotland) Act 2014 lists the minimum requirements that the annual procurement report must contain at section 18(2), as follows:

- (a) a summary of the regulated procurements that have been completed during the year covered by the report,
- (b) a review of whether those procurements complied with the authority's procurement strategy,
- (c) to the extent that any regulated procurements did not comply, a statement of how the authority intends to ensure that future regulated procurements do comply,
- (d) a summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report,
- (e) a summary of any steps taken to facilitate the involvement of supported businesses in regulated procurements during the year covered by the report,
- (f) a summary of the regulated procurements the authority expects to commence in the next two financial years,
- (g) such other information as the Scottish Ministers may by order specify

4. Scotland Excel's Annual Procurement Report

The Scotland Excel Annual Procurement Report has been prepared, meeting the requirements of the Procurement Reform (Scotland) Act 2014 and is presented to the committee as Addendum A. The presented content will be uploaded into an interactive format for publication.

5. Recommendation

Committee members are requested to note the content of this report and approve publication of the Annual Procurement Report as provided at Addendum A, and subsequently for submission to the Scottish Government by 30 September 2024.

Addendum A

**Scotland Excel
Annual Procurement Report
(1 April 2023 – 31 March 2024)**

Prepared May 2024

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Scotland Excel Annual Procurement Report 2023 - 2024

Introduction

Scotland Excel is the Centre of Procurement Expertise for the local government sector, established in 2008 as a non-profit shared service governed by a joint committee made up of elected representatives from Scotland's 32 local authorities.

The 32 local authorities share around 80% of the costs associated with operating Scotland Excel with the balance being generated by working with the sector, offering collaborative procurement support and commercial expertise.

Central to the established operating model is the delivery of effective commercial solutions for members. At the heart of this is the contract portfolio, with a value of c £2bn, which provides support to a wide range of local government services. The portfolio includes solutions for social care services, construction and property management, roads, transport and fleet operations, environmental services, and a wide range of goods required for corporate and educational settings. Also offered, in partnership with SEEMiS and The Digital Office, is a range of Information and Communication Technology services.

Contracts are developed in consultation with local government representatives, from procurement, commissioning and technical backgrounds, to ensure services meet the needs of Scottish communities. The structure of the contractual arrangements is always designed to encourage innovation, facilitate policy delivery, support local economic priorities and enhance social value in communities.

Scotland Excel provides value to customers by ensuring contracts delivered meet the duties laid down in the Procurement Reform (Scotland) Act 2014 ("the Act"). Section 18 of the Act requires public bodies that publish a procurement strategy to prepare an annual procurement report.

This annual procurement report will set out the performance of Scotland Excel against the corporate strategy and summarise the value delivered through procurement activity. The report documents performance against agreed objectives and strategic targets including those associated with Fair Work First and Community Benefit.

Scotland Excel annually publishes an operating plan linked to its five year strategy which sets out the strategic direction for its procurement activity and details the context in which Scotland Excel will work to ensure value for money is achieved. In addition to the overarching Strategy, Scotland Excel also works with its partners to articulate its approach to delivering an effective contract portfolio through the Sustainability Policy, Net Zero Strategy and a suite of Contract Strategies.

These targeted and specific approaches ensure Scotland Excel's portfolio has been developed with consideration to the wider social, economic and environmental priorities in a manner consistent the sustainable procurement duty under the Act.

Scotland Excel publishes the Annual Procurement Report via our website <http://www.scotland-excel.org.uk/>.

1. Section 1 Summary of Regulated Procurements Completed

Section 18(2)(a) of the Procurement Reform (Scotland) Act 2014 requires organisations to include, “a summary of the regulated Procurements that have been completed during the year covered by the report”.

A regulated procurement is completed when the award notice is published or where the procurement process otherwise comes to an end. This includes contracts and framework agreements. Appendix 1a provides a summary of the regulated procurements Scotland Excel has completed between 1 April 2023 and 31 March 2024. The appendix includes the following:

- schedule number (unique reference)
- award date
- title of the arrangement, giving the subject matter of the procurement
- estimated total annual value of the arrangement
- date from which the arrangement starts and is available for use
- end date
- names of each of the suppliers awarded a place

Scotland Excel also operates a small number of dynamic purchasing systems (DPS) and flexible frameworks which are unique in that new suppliers or providers can apply to be added during the advertised period. Appendix 1b shows those suppliers or providers appointed between 1 April 2023 and 31 March 2024.

During 2023/24 there were no additional suppliers appointed to the following arrangements.

- Digital Telecare Goods (DPS)
- Bikeability Scotland Training Providers (DPS)
- Residential Rehabilitation (Alcohol and Drugs) Services National Flexible Framework Agreement (“Flexible Framework Agreement”)
- National Flexible Framework for Care and Support Services
- Care Homes for Adults with Learning Disabilities Including Autism (Flexible Framework)

2. Section 2 Review of Regulated Procurement Compliance

Section 17 of the Act requires all regulated procurements to be carried out in line with the organisational procurement strategy. Section 18(2)(b) and (c) state that an annual procurement report must include “a review of whether those procurements complied with the authority’s procurement strategy” and “the extent to which any regulated procurements did not comply, and a statement detailing how the organisation will ensure that future regulated procurements do comply” respectively.

As a centre of procurement expertise, the Scotland Excel Corporate Strategy 2023-28 sets the values, objectives and principles of planned regulated procurements, providing value to members across key strategic areas as follows:

- Journey towards a net zero Scotland.
- Drive for efficiency to support the financial sustainability of local public service.
- Community wellbeing with equal access to services, economic development and fair work jobs.
- Resilient supply chains that maximise opportunities for Scottish businesses and the third sector.
- Advancement of skills to deliver Scotland’s economic transformation.

These corporate goals are enshrined in a new segmented approach which has been developed throughout 2023-2024 in support of the Public Procurement Strategy for Scotland. By segmenting the portfolio, priority is given to those sustainable objectives most relevant and proportionate for each procurement. This approach seeks to broaden how value is articulated and will be set out further in section 3.

Contract Strategies reflect the Corporate Strategy and are developed in collaboration with a User Intelligence Group (UIG). This ensures that the strategic procurement objectives for each exercise are targeted appropriately and will fulfil the requirements at the point of use. Scotland Excel’s approach to strategic procurement embeds extensive market and stakeholder consultation to establish the most effective blend of customer need to market capacity.

A review of each Contract Strategy is conducted as part of Scotland Excel’s established governance procedures. Throughout the Procurement Journey individual procurement exercises are reviewed, evaluated and monitored at a Contract Steering Group (CSG) before proceeding to the next stage in the procurement process.

The CSG is responsible for the governance of each appointed milestone of the procurement process from contract initiation through to contract award in line with the established gateways. These gateways are designed to ensure all Regulated Procurements are carried out in a manner compliant with the Act and with the corporate goals. Templates used in each exercise ensure relevant factors are captured and recorded against each arrangement.

A summary of how this process is used operationally is presented at Appendix 2a, including a table that sets out how the process was applied to live frameworks during the financial year 2023/24, Appendix 2b.

Those strategic procurement objectives agreed in consultation ensure each arrangement

incorporates the holistic set of economic, social and environmental outputs deliverable. These outputs are monitored and reviewed through ongoing contract and supplier management.

Performance against the corporate strategy and objectives for 2023/24 is shown at Appendix 3. This part of the report summarises the progress made against operating plan commitments and confirms the status of each activity.

3. Section 3 – Community Benefits and Fair Work First Summary

Community Benefits

Section 18(2)(d) of the Act states that it is mandatory for an annual procurement report to include “a summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report”.

A sustainable outcomes working group revised the community benefits process in 2022/2023, which increased stakeholder engagement, defined roles and responsibilities and embedded consistent thresholds, guidance and reporting templates.

Community Benefits submissions are made on a six-monthly basis by suppliers with more than £50,000 spend in the previous six months of recorded management information. The six-monthly cycle is aligned with Scotland Excel’s Joint Committee schedule, at which Community Benefits are reported. Community benefits reported for the period 1 April 2023 to 31 March 2024 are set out in Table 1. Community benefits reported per council area are set out in Appendix 4a.

Total number of apprenticeships recruited to deliver contracts	Total number of employees recruited to deliver the contract	Total number of work placement for adults	Total number of volunteering hours	Total number of hours of work experience for school/college/university students	Total monetary value of other community benefits
52	381	216	7,551	8,527	£1,501,238

Table 1: Community Benefits Reported 2023/2024

The summary below sets out examples of the range and type of community benefits reported by suppliers, delivered in 2023/24;

- Kibble Education and Care Centre appointed 10 apprentices in Renfrewshire Council to a one-year Career Start, Child & Youth care Worker Apprenticeship. This relates to spend reported against the Children’s Residential and Secure Care frameworks.
- Securigroup Limited appointed 14 Security Services apprentices and 50 employees across Glasgow City and Renfrewshire Councils in the delivery of the Security Services and Cash Collection framework.
- Initial Washroom have recruited 21 employees across 16 local authorities to deliver the Washroom Solutions and Sanitary Products framework.
- Suppliers awarded to the Domestic Furniture and Furnishings framework have appointed 38 employees across nine councils to deliver services. In addition, the reuse consortium, Circular Communities Scotland, have maintained 17 local employees across seven council areas in the performance of the contract.
- Under the Children’s Residential framework;
 - Moore House School Ltd appointed 11 employees in Perth and Kinross and 26 employees in West Lothian.
 - Harmeny Education Trust Limited have delivered 157 adult work placements in the City of Edinburgh council.
 - Aberdeen Association of Social Service provided over 3000 hours of work experience for student social work placements.
 - Hillside School (Aberdour) Ltd provided over 1750 hours of work experience in Fife council.
- Under the Care Homes for Adults with Learning Disabilities including Autism framework, Camphill (Blair Drummond) Trust have completed over 6000 volunteering hours in Stirling council.

- In North Ayrshire 56 hours of volunteering were completed by Dem-Master Demolition Ltd. to complete groundworks in preparation for Loudon Montgomery Primary School's sensory garden.
- Peacock Salt delivered over 900 hours of volunteering in South Ayrshire to renovate charitable premises and gardens for Enable Ayr and the South Ayrshire Autistic Society.
- In Highland Council Swansons Fruit Company Ltd provided 100 hours of work experience for a school pupil under the Milk Framework and over 400 hours of work experience was provided at The Furnishing Service's Dingwall depot.
- Under the Energy Efficiency Contractors framework in East Dunbartonshire community events were supported by E.ON Energy Solutions Ltd. This represented an estimated value of £12,000, and included offering advice on low carbon technology and help to access free, or heavily funded, energy efficiency measures.

Community Benefit requirements have been incorporated at the point of tender since 2013, with commitments made, monitored and reported over the lifetime of frameworks. Appendix 4b quantifies those benefits delivered over the last decade, with effective supply chain collaboration with the public sector delivering tangible outcomes for local communities.

Although the Covid-19 pandemic had an impact on individual measures in 2020/2021 and 2021/2022, recent reporting demonstrates that the volume of volunteering and work placements has increased considerably compared with work experience. While the number of new jobs and apprenticeships have returned to an upward trend the monetary value of community benefits has increased significantly since 2021/22.

Fair Work First

Another important aspect of framework development is the inclusion of Fair Work First, which was updated by SPPN 1/2024 in April 2024. This update provided further guidance on the implementation of criteria in all procurement processes and compliments statutory guidance published in May 2022 on Fair Work and Real Living Wage policy. Fair Work First is the Scottish Government's policy for ensuring high quality fair work across the labour market, the criteria for which are set out as follows;

- Payment of at least the Real Living Wage
- Provide appropriate channels for effective workers' voice, such as trade union recognition
- Investment in workforce development
- No inappropriate use of zero hours contracts
- Action to tackle the gender pay gap and create a more diverse and inclusive workplace
- Offer flexible and family friendly working practices for all workers from day one of employment and
- Oppose the use of fire and rehire practices.

The principle of Fair Work First has been embedded in all procurement exercises, with the mechanism for inclusion varying to take account of relevance and proportionality. Methodologies to incorporate Fair Work First range from targeted specification development to the introduction of appropriate selection and award criteria. This is informed by stakeholder engagement, market development and the strategic objectives of the

procurement. The established approaches will be refined as appropriate in accordance with recently updated guidance available via the sustainable procurement tools.

Scotland Excel has included formal consideration of the payment of the Real Living Wage in tenders issued since early 2015. Each Contract for Approval report to Scotland Excel’s Executive Sub Committee includes information on the respective position of all bidder’s work practices, including payment of the Real Living Wage. In February 2022 the Executive Sub Committee were invited to note an update on matters relating to the payment of the Real Living Wage. This sought to improve the level of commitment suppliers make to paying the Real Living Wage and to mandate wherever legally possible.

At the close of the financial year 975 suppliers were awarded to Scotland Excel framework agreements, of which 872 (89.4%) notified that they pay the Real Living Wage. For frameworks awarded during 2023/24, 246 (89.1%) of suppliers notified that they pay the Real Living Wage. This is recorded in the following categories, recognising the accreditation of some suppliers and the self-assessment of others.

Paying and Accredited	Paying & Progressing to Accreditation	Paying & Commitment to Accreditation	Paying but No Commitment to Accreditation	Not Paying but Commitment to Pay	Not Paying
257 (26.36%)	49 (5.03%)	91 (9.33%)	475 (48.72%)	35 (3.59%)	68 (6.97%)

Table 2: Payment of Real Living Wage

Public Procurement Strategy for Scotland, Segmentation and Performance Management

In April 2023 the first Public Procurement Strategy for Scotland was published with the central purpose outlined *“To use our collective spending power to deliver sustainable and inclusive economic growth”*. Aligned with the enablers and outcomes of the Sustainable Procurement Duty the strategy is structured in accordance with the National Performance Framework setting a vision for procurement which is;

- Good for businesses and employees
- Good for society
- Good for places and communities
- Open and connected

In recognition of the power of procurement and the ambitious sustainable outcomes the sector can deliver, a segmentation approach has been developed and launched throughout 2023/2024. Each procurement exercise balances the economic, environmental and social benefits possible through a national collaborative exercise and establishes a segmented priority for the procurement. This priority will be derived from stakeholder consultation, an assessment of the risk and opportunities present and sphere of influence all in accordance with the sustainable procurement tools and principles of the Procurement Reform (Scotland) Act 2014.

Where a first generation or renewal is added to the Contract Delivery Plan, at contract initiation the segmented priority will be considered. Strategic procurement activity to establish the contract strategy will determine the segmented priority and seek endorsement from the established User Intelligence Group. This priority will be articulated by the strategic

procurement objectives with mechanisms to embed the approach set out in the sustainability section of the document. A record of how the success of the approaches will be measured will be drafted in accordance with the Scottish Government's Procurement Benefit Reporting Guidance. These measures will be embedded through tender, contract award and contract mobilisation stages of the procurement journey.

This will enable the launch of Scotland Excel's performance management framework in 2024/2025. Strategic procurement and commissioning teams have a range of commercial and social measures well established such that historical data is available for interrogation e.g. savings, community benefits and real living wage. Mechanisms to measure social impact are evolving to take account of Community Wealth Building and Wellbeing. Furthermore, procurement is innovating to attach a value to whole life costing initiatives. These developing measures require baselining in support of the Public Procurement Strategy for Scotland.

The primary driver for a new approach, however, is the scale of the transformation needed to deliver Net Zero 2045, which is currently under-represented in quantitative reporting. In March 2023, Scotland Excel's Executive Sub-Committee approved Scotland Excel's Net Zero Strategy 2023-2028. This Net Zero Strategy is used to support Scotland Excel member councils in the delivery of their individual and collective net zero goals linked to Scottish Government 'climate emergency' policy and legislation. Within the scope of the action plan is a revised sustainable procurement policy for publication in 2024, which will set out how the measurement of environmental measures will be developed.

The launch of the performance management framework, underpinned by a segmented approach, will transform the measurement and reporting of sustainable procurement outcomes over the term of the Public Procurement Strategy for Scotland.

4. Section 4 – Supported Businesses Summary

Section 18(2)(e) of the Act requires organisations to summarise steps taken to facilitate the involvement of supported businesses in regulated procurement. Scotland Excel recognises that supported businesses provide a crucial contribution to the Scottish economy.

Regulation 21 of The Public Contracts (Scotland) Regulations 2015 defines a supported business as “...an economic operator whose main aim is the social and professional integration of disabled or disadvantaged persons where at least 30% of the employees are disabled or disadvantaged persons”. Regulation 21 also permits a contracting authority to reserve the right to participate in the procurement to a supported business.

Involvement of supported businesses is undertaken during strategy development and engagement facilitated through Prior Information Notices (PIN) or established networks e.g. the British Association for Supported Employment (BASE). Furthermore, during contract strategy development category teams consider appropriate interventions to facilitate involvement. For example, sub-lot product groupings to reduce barriers to entry or encourage tier one suppliers to target their community benefit commitments to the establishment of supply chain relationships with supported businesses. This model was introduced in the Domestic Furniture and Furnishings framework in recognition of the number of supported businesses operating in this market.

An opportunity assessment was undertaken for a reserved framework for Personal Protective Equipment (PPE) and added to the contract delivery plan for 2023/2024. The market did not develop as anticipated post-pandemic and the limited interest in a reserved PPE framework reduced the potential benefits deliverable from a national collaborative arrangement. This development would also have overlapped with the category A Dynamic Purchasing System and consideration was given to the duplicate tendering burden a category B arrangement in 2023-2024 would have placed on the market.

Although no procurements were reserved during 2023/24 a comparison was made of those supported business listed in the buyer guidance of the Scottish Government’s 2023 Dynamic Purchasing System (DPS). This includes both those awarded and those not awarded. Findings are that eight supported businesses are awarded a place on a Scotland Excel arrangement that was live in 2023/24 as set out below;

- Hey Girls Cic, are awarded to the Washroom Solutions and Sanitary Products framework and received c. £1.6m spend in 23/24.
- City Building (Contracts) LLP are awarded on three construction frameworks with spend of c.£34k reported in 23/24.
- Royal British Legion Industries Ltd T/a Scotland's Bravest Manufacturing Company has recently been re-awarded onto the Road Signage Materials framework. With a contract start date 1 April 2024 no spend is yet available, however, on the previous generation of the framework c.£787k was reported over four years.
- Five supported businesses were awarded to the Employability Services DPS, for which no spend data is collected.

Section 9 of The Procurement Reform (Scotland) Act 2014 places a duty on contracting authorities to “...*facilitate the involvement of small and medium enterprises, third sector bodies and supported businesses in the process...*”.

In November 2023, a Supported Business event was hosted with a focus on how local government and supported businesses can collaborate in support of Community Wealth Building. This event included speakers from BASE, Morison Construction and the Scottish Government’s National Collaborative Procurement Division. The keynote was delivered by Mr. Tom Arthur, Minister for Community Wealth and Public Finance, subsequently appointed as Minister for Employment and Investment in May 2024.

Early in 2024-2025 Scotland Excel signed up to the Buy Social Pledge a “*values-led initiative for those bodies looking to make a commitment to bring social enterprises into their supply chains*”. This commits action on the recognition of Fair Work for all, embracing a net zero policy, supporting social enterprises and prompt payment as well as measuring impact. In addition to the supported businesses spend listed above an additional c.£18.2m spend was reporting for social enterprises for financial year 23/24.

Scotland Excel will continue to work across the sector to promote the advancement of working relationships with local supported businesses. This is in recognition of the contribution made by those organisations in supporting local economies and providing essential job opportunities for disabled and disadvantage people within communities.

5. Section 5 – Future Regulated Procurements Summary

Section 18(2)(f) of the Act states it is mandatory that an annual procurement report must include *“a summary of the regulated procurements the authority expects to commence in the next two financial years.”*

Scotland Excel undertakes extensive stakeholder engagement in the development of national collaborative arrangements. Portfolio information is available to encourage competition and achieve best value and can be accessed via the Contracts Register [here](#). Most commonly market engagement is facilitated by the issue of a Prior Information Notice, consistently providing advance notice of future opportunities.

Scotland Excel has 47 regulated procurements due for renewal (or subject to contract extension) over the next two financial years. In addition, Scotland Excel plans to complete regulated procurements for 2 new contract areas in financial year 2023/24. Details of these anticipated contract requirements are shown in Appendix 5.

6. Section 6 – Additional Considerations

Scotland Excel submitted a response to the Procurement Reform (Scotland) Act 2014 (“the Act”) consultation in October 2023, and was invited to give evidence to the Economy and Fair Work Committee in March 2024. The scope of the consultation included views on whether the Act was working, barriers to accessing procurement in Scotland and examples of good practice.

The Scotland Excel submission recognised the significant progress made since the Act was introduced particularly on social outcomes, but that environmental outcomes were under-developed, given the call to action to deliver Net Zero 2045. Strategic procurement resources are currently being shaped to explore emerging markets and consider whether alternative procurement mechanisms are appropriate in response to the climate emergency. One year into the five-year strategy, progress against short-medium term objectives were reported to the Executive Sub Committee in May 2024. This included climate training, the redesign of frameworks, implementation of revised policy and extensive stakeholder engagement in the development of carbon monitoring.

Another central theme was the need for greater visibility on how the principles of Fair Work First are cascaded in the supply chain in support of Community Wealth Building (CWB) initiatives. This conflates with responses for both the Wellbeing and Sustainable Development (Scotland) Bill and the Building Community Wealth in Scotland consultations. While recognising that measures to advance CWB and Wellbeing are positive, these submissions sought clarity on how any additional duties would complement existing procurement legislation.

During 2023/2024 a dedicated savings team has explored commercial opportunities to increase savings obtainable through economies of scale. Projects completed until the end of March 2024 represented an additional £2.9 million savings for members through product swaps, collaboration and targeted negotiation.

Supporting the goals of Scotland’s Digital Agenda a single supplier framework agreement for a Shared Alarm Receiving Centre (ARC) technology solution was delivered in 2023/2024. Development of an arrangement for a Security Operations Centre(SOC) has commenced, to enhance the ability of members to protect their digital infrastructure. This is alongside the renewal of the Technology Enabled Care Goods framework in the delivery of the digital portfolio.

In March 2024 the first-generation Residential Rehabilitation (Alcohol and Drugs) Services National Flexible Framework Agreement was awarded. This arrangement enables purchasers to source residential rehabilitation services for people experiencing problematic use of alcohol and/or drugs, to support their recovery. Further development of services is underway over the course of 2024/2025, with research into effective commissioning and procurement of family-based support services. This is connected with the social welfare functions of the Scottish Ministers and local authorities.

Scotland Excel also offers an award-winning learning and development programme, and provides assessment, consultancy and improvement services to help councils transform their procurement capability.

At Scotland Excel, there is a commitment to demonstrate innovation and continuous improvement in all aspect of delivery. To further promote innovation in public procurement, further to SPPN 3/2023, Scotland Excel are represented on the Scotland Innovates Triage

& Delivery Board, to assess proposals submitted via the new portal. This is alongside internal mechanisms to encourage category teams to signpost supply chain stakeholders to Scotland Innovates as arises.

The organisation has won several awards for its work, as well as holding accreditations which reflect a commitment to best practice in procurement, organisational development and workforce matters.

- CIPS Procurement Excellence Program - Standard Award - This award signifies that Scotland Excel has the procurement governance mechanisms in place for effective supply assurance and compliance.
- Investors in People (IiP) Gold accreditation - IiP is a UK government initiative, providing a best practice people management standard, and is regarded as an indication that Scotland Excel is a great employer, an outperforming place to work and has a clear commitment to sustainability.
- Chartered Management Institute Approved Centre- Scotland Excel is an approved centre for the delivery and assessment of CMI leadership and management qualifications.
- Living Wage - Scotland Excel is proud to be a Living Wage employer. Living wage is a voluntary hourly rate set independently and updated annually, calculated according to the basic cost of living in the UK.

At the 2023 Scottish GO Awards the Children's Residential framework won the collaborative procurement category in recognition of the detailed stakeholder work undertaken to develop the third-generation renewal. This resulted in a framework with an increased range of enhanced offerings and greater flexibility for members to purchase individualised services.

Appendix 1a: Procurement Completed 1 April 2023 to 31 March 2024

Schedule No.	Award Date	Title	Total Annual Value	Start Date	End Date	Supplier Name
0322	11/04/2023	Supply and Distribution of Fresh Meats, Cooked Meats and Fresh Fish	£10,000,000	17/04/2023	31/03/2027	Bernard Corrigan Limited, BFS Group Limited, Brake Bros Limited, Campbell Brothers Limited, Gordon McWilliam (Aberdeen) Limited, McLays Limited, Thos A Shaw
0822	12/04/2023	Supply, Delivery And Installation Of Audio Visual Equipment	£9,000,000	12/04/2023	02/04/2027	AVMI Kinly Ltd, Irruptus Limited, Learning Space Belfast Ltd, Mediascape Ltd, SSUK Limited
0920	19/04/2023	Building Construction Consultancy	£25,000,000	19/04/2023	18/04/2027	AECOM Ltd, AHR Architects Limited, AMP Architects LLP, Anderson Bayne Limited, Anderson Bell Christie Limited, Armour Construction Consultants, Atkins Limited, Austin-Smith:Lord Limited, Baker Hicks Limited, Barham Glen Architects Limited, Bayne Stevenson Associates LTD, Brown & Wallace LLP, WSP (Real Estate and Infrastructure) Ltd, Clancy Consulting Ltd, Clerk Of Works Inspection Services Limited, Collective Architecture Limited, Coltart Earley Limited, Core Associates Ltd, CRGP Limited, Currie & Brown UK Limited, Curtins Consulting Limited, Narro Associates Limited, Davie + McCulloch Ltd, Delta-Simons Limited, Doig and Smith Ltd, DSSR Limited, DWA Landscape Architects Limited, ECD Architects Ltd, EDP Consulting Engineers Ltd, F.G. Burnett Limited, Fairhurst Group LLP, Faithful+Gould Limited, Forbes Leslie Network Ltd, G3 Consulting Engineers Ltd, Gardiner & Theobald LLP, Gareth Hoskins Architects Limited, Gleeds Management Services Limited, Goodson Associates Limited, Graham + Sibbald Technical Services LLP, Grant/Murray Architects Ltd, Hardies LLP, Harley Haddow Limited, Hawkins Brown Design Limited, Hawthorne Boyle Limited, Helica (Scotland) Ltd, Hickton Quality Control Ltd, HLMAD Limited, Holmes Miller Ltd, Hydrock Consultants Limited, Hypostyle Design Limited, IMG Quality Control Ltd, Ironside Farrar Limited, John Gilbert Architects Limited, Kiloh Associates Limited, L A Simpson Ltd, Land Use Consultants Limited, LDA Design Consulting Ltd, Mackie Ramsay Taylor Limited, MASTARCH LTD, Max Fordham LLP, Mott MacDonald Limited, Nicoll Russell Studios Limited, NORR Consultants Limited, Oberlanders Architects LLP, Page \ Park Limited, Pick Everard, PJP Architects LLP, Rankin Fraser Landscape Architecture LLP, Robert Potter and Partners LLP, Robinson Low Francis LLP, RPS Consulting Services Limited, RSK Environment Limited, RSP Consulting Engineers LLP, Rybka Limited, Ryder Architecture Limited, Savills (UK) Limited, Sheppard Robson Architects LLP, Simpson & Brown, Smith Scott Mullen + Associates Ltd, Space Solutions (Scotland) Limited, Stellan Brand Architecture + Design Limited, Summers-Inman Construction and Property Consultants LLP, Tetra Tech Limited, Thomas & Adamson, Thomas C Stewart LLP, Thomson Gray Limited, Turner & Townsend Project Management Limited, Viridis Building Services Ltd, Waterman Structures Limited, Wellwood Leslie LLP, Will Rudd Davidson (Edinburgh) Limited, WSP UK Limited, Wylie Shanks Architects LLP
1322	24/05/2023	Supply, Delivery and Installation of Commercial Catering Equipment	£1,500,000	01/06/2023	31/05/2027	Airedale Catering Equipment Limited, Bunzl UK Limited trading as Lockhart Catering Equipment, E & R Moffat Limited, Instock Ltd, Lovat's Catering Engineering Services Limited T/A Lovat's Group, Merchant City Refrigeration (Scotland) Ltd, Nisbets PLC, Stephens Catering Equipment Company Limited

Appendix 1a continued: Procurement Completed 1 April 2023 to 31 March 2024

Schedule No.	Award Date	Title	Total Annual Value	Start Date	End Date	Supplier Name
1821	16/06/2023	Property Maintenance And Refurbishment	£75,000,000	16/06/2023	15/06/2027	A Macneil Painting & Taping Contractors Ltd, A Tech Heating Limited, Adman Int Ltd, Affiniti Response Limited, Ailsa Building Contractors Limited, Alexander Community Development Limited, Anderson Property Services (Scotland) Limited, Andrew P. Orr (Decorators) Limited, Andrew Shepherd Construction Limited, Bancon Construction Limited, Bell Group UK Limited, Blackrock Construction Group Ltd, Blantyre Park Services Ltd, Boyd Brothers (Fauldhouse) Limited, Braedale Roofing Limited, Brannock Decorators Ltd, BRB Electrical Limited, British Gas Social Housing Limited T/A PH Jones, C & S Facilities Management Limited T/A C&S Group, C R Smith Glaziers (Dunfermline) Limited, Cameron Painters & Decorators Limited, Care Electrical Contractors Limited, CBES Limited, CCG (Scotland) Limited, City Building (Contracts) LLP, Clark Contracts Limited, CM Camans (Partnership), Compass Building and Construction Services Ltd, Dalebay Limited T/A Noble & Bradford, Dean Chalmers T/A Chalmers Electrical, Dumbreck Decorators Limited, E.W. Edwardson (Electrical Contractors) Limited, Emac Engineering Limited, Emtec Property Services Limited, Everwarm Ltd, Faskin Group Ltd, Fergus T Davidson T/A FT Davidson, First Call Trade Services Limited, Frank Swords & Sons Limited, G A Davidson Limited, G K L Plumbing & Heating Ltd, G.D. Chalmers Limited, G.M.G. (Contractors) Limited, George B Grigg T/A Musselburgh Roofing and Building Services, GF (UK) Limited T/A F Forbes and Son, Gordon & Halliday Flooring Contractors LLP, Graham MacGregor Limited, Hugh Stirling Limited, I D Hubbard Ltd, Ideal Flooring Solutions Limited, Integrated Environments Limited, Invincible Security Ltd., J.S.K Construction Services Ltd, James Frew Limited, Lawrie (Furnishings) Limited, Lochlie Construction Limited, Magnus Electrical Services Limited, Martec Engineering Group Limited, Matrix Ceiling Distribution Limited, Maxi Construction Limited, MCK Windows & Doors Ltd, McKellars of Ayrshire Limited, McMillan Highland Ltd, MITIE Property Services (UK) Limited, Morris & Spottiswood Limited, Novus Property Solutions Limited, Ogilvie Construction Limited, Orbis Services Limited, Preah Building Services Limited, Prime Build Solutions Limited, Procast Building Contractors Ltd, PWM Contracts Limited, Quality Assured Property Maintenance Limited, Richard Irvin FM Limited, Robert P. Slight & Sons Limited, Robertson-Acom Limited, Saltire Facilities Management Limited, Sennit Construction Ltd, Sidey Solutions Limited, Spectrum Decorating Ltd, Stein Electrical & Mechanical Solutions Limited, Summit Facilities Services Ltd, Taggart Contract Flooring Limited, Thomson Glazing Limited, Trident Maintenance Services Ltd, Valley Group Limited, Ventro Ltd
0723	02/10/2023	Supply and Delivery of Fresh Bread, Rolls & Bakery Products	£2,000,000	02/10/2023	30/09/2027	George Anderson & Sons, Fergusons Bakers Limited, D. McGhee and Sons Ltd, Black of Dunoon (Bakers) Ltd
1122	09/10/2023	Supply, Delivery, Servicing And Maintenance Of Fire Safety Products	£875,000	09/10/2023	08/10/2027	Bell Fire And Security Limited, Core Fire Ltd, M & S Fire Protection (Glasgow) Limited, Lion Safety Limited, Churches Fire Security Ltd, Boyd Group (Scotland) Limited, Caledonia Fire And Security Limited, Tyco Fire & Integrated Solutions (UK) Limited
0422	03/11/2023	Provision of a Shared Alarm Receiving Centre (ARC) Technology solution	£2,500,000	06/11/2023	06/11/2029	Chubb Fire & Security Limited
0722	14/12/2023	Asbestos Related Works And Services	£7,000,000	14/12/2023	13/12/2027	A&C Asbestos Consultants Inc Ltd, Acorn Analytical Services Ltd, Addison Green Limited, Asbestos Analytical Services Limited, Asbestos Specialists (UK) Ltd, Aspect Contracts Limited, Carymar Construction Services Limited, Chamic Industrial Services Limited, Clarke's Environmental Limited, Enviraz (Scotland) Limited, Enviraz Surveys Ltd, Environtec Limited, Franks Portlock Consulting Limited, The Future Group (Highland) Limited, Gowrie Contracts Limited, Henderson Environmental Services Ltd, HSL Compliance Ltd, Intona Limited, Life Environmental Services Limited, Lucion Services Limited, Northern Asbestos Services Limited, OHS Limited, Rhodar Industrial Services Limited, SOCOTEC Asbestos Limited, Strada Environmental Limited, Tersus Consultancy Limited, Acron Asbestos Ltd, Asbestos Building Surveys Limited, Bradley Environmental Consultants Limited, Clyde Environmental Consultants LTD, DNKA LTD, E.D.P Health, Safety and Environment Consultants Limited, ENVIRONMENTAL ESSENTIALS LIMITED, WSP UK Limited

Appendix 1a continued: Procurement Completed 1 April 2023 to 31 March 2024

Schedule No.	Award Date	Title	Total Annual Value	Start Date	End Date	Supplier Name
1522	12/03/2024	Grounds And Plant Equipment	£8,000,000	13/03/2024	12/03/2028	Agricar Limited, Alex McDougall (Mowers) Limited, BOMAG (Great Britain) Limited, Bryson Tractors Limited, Capital Power Clean Limited, FAIRWAYS (GM) LTD. Finning (UK) Ltd, FRASER C ROBB LIMITED, Gammies Groundcare Ltd, H.R.N. Tractors Limited, HAMILTON BROS. (ENGINEERING) LIMITED, Henderson Grass Machinery Limited, Henry Sheach Lawnmower Services Limited, J.C. Peacock & Co., Limited, James A. Cuthbertson, Limited, Lloyd Limited, Mark Oman T/A Oman Mechanical Solutions, Morris Leslie Plant Hire LTD, Powerwasher Services Limited, Reesink UK Ltd, Spaldings Limited, Strath, Agrovista UK Limited, Balgownie Limited, Frank Nicol Farm and Garden Machinery Limited, Ravenhill Limited, Reid Hydraulic Services Limited, Scot J C B Limited bogie Forest & Garden Ltd, The Double A Trading Company Limited, Tudor (UK) Ltd T/A Tudor Environmental, Unilokomotive Limited, Wirtgen Limited, Agrovista UK Limited, Balgownie Limited, Frank Nicol Farm and Garden Machinery Limited, Ravenhill Limited, Reid Hydraulic Services Limited, Scot J C B Limited
2322	15/03/2024	Security Services And Cash Collection	£17,500,000	15/03/2024	14/03/2028	Allander Security Limited, Amberstone Security Limited, Anubis Security Limited, Chase Services Group Ltd, Amulet (Churchill Security Solutions) Limited, G4S Cash Solutions (UK) Limited, G4S Secure Solutions (UK) Limited, Kingdom Services Group Limited, Loomis UK Limited, Mitie Security Limited, Portal Security Ltd, Profile Security Services Limited, Protec Facilities Management Ltd, Securigroup Limited, Securitay Limited, Security Plus Limited, Triton Security & Facilities Management Limited, Vigilant Protect UK Limited
0623	01/03/2024	Supply and Delivery of Civic Supplies	£1,250,000	01/04/2024	31/03/2028	Tennent Caledonian Breweries Wholesale Limited
0123	27/03/2024	Residential Rehabilitation (Alcohol and Drugs) Services National Flexible Framework Agreement ("Flexible Framework Agreement")	£15,000,000	01/04/2024	31/03/2028	Abbeycare(uk) Limited, Alternatives West Dunbartonshire Cds, Castle Craig Hospital Limited, Crossreach (the Operating Name For The Church Of Scotland Social Care Council), Maxie Richards Foundation, Phoenix House, Ram 225 Limited, The Jericho Benedictine Society
2222	27/03/2024	Supply and Delivery of Road Signage Materials	£1,250,000	01/04/2024	31/03/2028	AnSCO Signs Limited, Coeval Ltd, Limelight Signs Ltd, Mallatite Limited, P. F. Cusack (tools Supplies) Ltd, Royal British Legion Industries Ltd T/a Scotland's Bravest Manufacturing Company, Stocksigns Limited, Street Lighting Supplies & Co Ltd, Swarco UK & Ireland Ltd, William Smith Group 1832 Limited

Appendix 1b - Appointments to DPS or Flexible Framework 1 April 2023 - 31 March 2024

Title	Supplier / Provider	Date of Award
Employability Services Flexible (DPS)	Helm Training Limited The Ridge SCIO Adopt an Intern Ltd (t/a AAI EmployAbility) Stepwell Consultancy Ltd.	04/04/2023 08/06/2023 03/07/2023 12/09/2023
Treatment and Disposal of Recyclable and Residual Waste (DPS)	Diverse Investments Scotland Ltd t/a New Town Skips Harper Contracts Insch Ltd John McGeady Ltd Viridor Energy Limited	06/06/2023 29/01/2024 21/03/2024 28/03/2024
Children's Residential Care and Education, including Short Break, Services Flexible Framework Agreement	Ardfern Limited Phoenix Abbey Limited Compass Child and Family Services The Governors of the Donaldson Trust Common Thread Limited House of Falkland Limited High Trees Limited Gilmourbanks Limited New Futures (Scotland) Limited	30/10/2023 13/11/2023 23/11/2023 27/11/2023 20/03/2024 20/03/2024 20/03/2024 20/03/2024 20/03/2024
Social Care Agency Workers Flexible Framework Agreement	Care Response 24/7 Ltd	04/04/2023

Appendix 2a: Contract Steering Group - Governance Gateways

Process Stage		Process Stage	
1	Contract Initiation	23	Tender Analysis Evaluation
2	Market Research and Analysis	24	Tender Evaluation Approved
3	Communicate Strategy Pack to UIG for Review	24a	Overall Evaluation Approved
4	Strategy Approved	24b	Approved that Strategy Requirements Met
4a	Initial Approval	24c	Recommendation and Benchmarking Approved
4b	Alignment with overall corporate objectives	24d	Recommendation communicated to UIG
4c	Approach for Participation & Benchmarking	24e	Feedback to HoSP post UIG for final decision as required
4d	Sustainable Procurement Duty	25	Prepare Sub Executive Committee Report
4e	Authorise release to UIG & CPM's for information with benchmarking requests	26	PTN Approved
5	Draft SPD	27	Conduct PTN
6	SPD Approved	28	Executive Sub-Committee Report Approved
7	SPD Issued	29	Executive Sub-Committee Authorisation to Award
8	SPD Period (Inc. Clarifications)	30	Prepare and Issue Standstill Letters
9	SPD Return Date	31	Standstill Period
10	SPD Opened and Recorded	32	De-brief Unsuccessful Tenderers
11	SPD Analysis	33	Standstill Period Expired
12	SPD Short List Approved	34	Prepare Contract Award Letters
13	SPD Decision and De-brief	35	Contract Award Letters Issued
14	Draft Contract Notice	36	Contract Award Notice Approved
15	Contract Notice Approved	37	Contract Award Notice Published
16	Contract Notice Published	38	Mobilisation Implementation Plan
17	Prepare Tender Documents	39	Contract Start Date
18	Tender Documents Approved	40	Contract Management Annual Review
18a	Overall Tender Approved	40a	40a. Overall CM Report Approved
18b	Approved that Strategy Requirements Met	40b	40b. Approved Strategy Requirements/Agreed Variations Met
18c	Evaluation Methodology and Weightings Approved	40c	40c. Next Steps Plans Approved
19	ITT Issued via PCS and benchmarking templates to Councils	41	Extension Reports
20	Tender Period (Incl Clarifications)	41a	Overall Extension Report Approved
21	Tender Return Date - Any Extension?	41b	Approved Strategy Requirements (and/or any agreed variations) Met by CM
22	Tenders Opened and Recorded	41c	Next Steps Plans Approved - inc. Exit Strategy

Appendix 2b: Governance Gateways and application to contracts 23/24

Contract	Governance Gateway						
	Options Appraisal	Strategy	Evaluation Methodology	Recommendations	Executive Sub Committee Report	Annual Report	Extension Report
Asbestos related Works and Services			04/05/2023	20/09/2023	27/09/2023		12/04/2023
Bitumen Products							14/02/2024
Bread and Rolls		24/05/2023	01/06/2023	22/08/2023	24/08/2023		
Building & Timber							27/09/2023, 13/03/2024
Care & Support Services Flexible Framework Agreement		30/08/2023	19/09/2023				31/01/2024
Catering Sundries		05/03/2024					19/07/2023
Civc Supplies		20/04/2023	19/07/2023	25/01/2024	25/01/2024		
Cleaning Equipment		20/04/2023	09/01/2024	13/03/2024	21/03/2024		
Commercial Catering Equipment					06/04/2023		
Community Meals		27/09/2023	14/03/2024				14/12/2023
Construction Materials		21/06/2023	30/08/2023	28/02/2024, 20/03/2024	28/02/2024		
Domestic Furniture and Furnishings							22/09/2023
Educational Materials							05/10/2023
Electrical Materials							27/09/2023, 13/03/2024
Fire Safety				22/08/2023	24/08/2023		
Flexible Framework for Residential Rehabilitation and Detoxification (Alcohol and Drugs) Services		12/04/2023	18/05/2023	31/01/2024	14/02/2024		
Fostering and Continuing Care							22/11/2023
Fresh Fruit & Vegetables		08/11/2023	09/01/2024	13/03/2024	21/03/2024		
Gounds and Plant Equipment			12/04/2023	16/11/2023	22/11/2023		
Groceries and Provisions							14/12/2023
Heavy and Municipal Vehicles							16/11/2023
LHEES Local Heat and Energy Efficiency Strategies		05/07/2023	24/08/2023				
Library Books						05/03/2024	
Milk						19/09/2023	
New Build Residential Construction							20/12/2023
Plumbing & Heating							27/09/2023, 13/03/2024
Road Signage				14/02/2024	28/02/2024		
Secure Care Services							10/08/2023
Security Services and Cash Collection		20/04/2023	19/09/2023	09/01/2024	09/01/2024		
Shared Digital ARC				03/08/2023	03/08/2023		
Sheriff Officers		13/03/2024	21/03/2024				
Technology Enabled Care				14/03/2024, 26/03/2024	26/03/2024		
Vehicle and Plant Hire							17/01/2024
Vehicle Parts							28/02/2024
Waste Disposal Equipment		14/02/2024					
Musical Instruments							21/03/2024
Fresh Bread, Rolls & Bakery Products		24/05/2023	01/06/2023	22/08/2023	24/08/2023		













Operating Plan

2023 – 2024






Year End Report

Value delivery: procurement & commissioning






Action	RAG status	Progress summary
<ul style="list-style-type: none"> Implement refreshed category strategies to inform the development of contract delivery plans and market shaping activities. 		<ul style="list-style-type: none"> Scotland Excel is continuing to restructure its strategic procurement and commissioning function. This will support the alignment of new category strategies, which will also benefit from the introduction of segmentation around each framework's commercial, social and/or environmental value.
<ul style="list-style-type: none"> Review and refresh Scotland Excel's approach to contract delivery planning, extending the visibility of the decision-making and delivery process over a longer timeframe to support contract <u>utilisation</u>. 		<ul style="list-style-type: none"> Ongoing improvements to Scotland Excel's contract delivery planning process continue to increase the predictability of framework delivery timelines. Measures already in place include training, process automation, standardisation, and changes to the review process.
<ul style="list-style-type: none"> Review and refresh Scotland Excel's approach to key supplier management (KSM) and contract and supplier management (CSM) to identify further savings and efficiency opportunities for members. 		<ul style="list-style-type: none"> Scotland Excel continues to evolve its KSM/CSM activities, supported by the ongoing restructuring of the strategic procurement and commissioning function. Savings opportunities are currently being explored with key education and facilities management suppliers.
<ul style="list-style-type: none"> Continue to develop and deliver savings projects to maximise the commercial value returned to members through optimal use of our frameworks. 		<ul style="list-style-type: none"> Since it was established in August 2023, Scotland Excel's savings team has explored 30 opportunities, 25 of which have progressed following further data analysis. Thirteen opportunities, with a value of £4.2m, have now been delivered. The team is forecasting that the value of savings opportunities will reach c. £7.6m during the first year of operation against a target of £5m.
<ul style="list-style-type: none"> Develop and deliver a methodology for assessing and presenting the total value of membership including framework savings, rebates, community benefits, service delivery, skills development, and other benefits. 		<ul style="list-style-type: none"> Work is ongoing to develop a performance management framework which will strengthen and extend the measurement of the value created by Scotland Excel for members, and support the implementation of strategic and operational Key Performance Indicators (KPIs). The framework will be introduced during 2024-25.

<ul style="list-style-type: none"> Continue to support local economic development through identifying and promoting supply chain opportunities for Scottish businesses. 		<ul style="list-style-type: none"> During Q4, Scotland Excel delivered a training session for suppliers on behalf of the Supplier Development Programme, and exhibited at Meet the Buyer Tayside event. Scotland Excel continues to take part in the Scottish Government's cross-sectoral Supplier Development Group, and is supporting a number of related workstreams.
<ul style="list-style-type: none"> Develop and deliver an action plan to monitor payment of the Real Living Wage by suppliers, providing reports to members which enable them to evaluate and select suppliers on this basis. 		<ul style="list-style-type: none"> Real Living Wage descriptors have been changed to improve the alignment of each Scotland Excel supplier to its Real Living Wage status. Work is ongoing to develop reporting capability as part of the wider refresh of Scotland Excel's procurement processes.
<ul style="list-style-type: none"> Implement actions from Scotland Excel's net zero strategy, via a whole organisation approach, to support our members' net zero journey. 		<ul style="list-style-type: none"> Scotland Excel is continuing to make progress in the delivery of its net zero strategy, supported by a multi-disciplinary delivery group which oversees the implementation of the accompanying action plan. Net zero considerations form part of ongoing improvements to contract governance and processes, and a new sustainability policy is close to completion. An annual report on progress against the strategy and action plan will be presented to the executive sub-committee in May.
<ul style="list-style-type: none"> Continue to work with cross-sector partners to develop positive carbon impact initiatives linked to procurement activities. 		<ul style="list-style-type: none"> Work is continuing with partners to develop opportunities for district heat networks, electric vehicle charging concession models, and rural mobility. Scotland Excel is also engaging with stakeholders to inform a consistent approach to monitoring, recording and reporting on net zero commitments.
<ul style="list-style-type: none"> Monitor, respond to, and report on national policy changes that affect Scotland Excel's procurement portfolio, including the National Care Service, contributing to policy discussions where appropriate. 		<ul style="list-style-type: none"> Scotland Excel gave oral evidence on the impact of the Procurement Reform Act to the Scottish Parliament's Economy and Fair Work Committee in March. Participation in National Care Service (NCS) forums and meetings continues, including the newly formed Expert Legislative Advisory Group.







Value delivery: services








Action	RAG status	Progress summary
<ul style="list-style-type: none"> Explore alternative business models to support sustainable growth and reduce reliance on membership fees. 		<ul style="list-style-type: none"> This action has been removed from current operating plan as Scotland Excel's existing business model supports the delivery of current strategic priorities.
<ul style="list-style-type: none"> Continue to grow and develop procurement capability projects, initiative and services for members including support for the next tranche of Procurement & Commercial Capability Services (PCIPs). 		<ul style="list-style-type: none"> Procurement & Commercial Improvement Programme (PCIP) assessments have been delivered for 17 councils that elected to participate in the current assessment cycle. The timeline for completing the final three assessments has been extended until May 2024 due to scheduling constraints. Once completed, a series of workshops will be held to discuss and share best practice.
<ul style="list-style-type: none"> Implement Scotland Excel's business development strategy to increase demand for services and grow associate membership. 		<ul style="list-style-type: none"> Scotland Excel continues to grow its associate membership. In Q4, membership was approved for a housing association, bringing the total number of new members during 2023-24 to 19, contributing £30,627 in annual fee income.
<ul style="list-style-type: none"> Develop and implement plans to deliver Scotland Excel's new Academy strategy, based on a sector training needs analysis and recognising member requirements for affordable training options. 		<ul style="list-style-type: none"> The Scotland Excel Academy continues to deliver a range of accredited learning programmes, practitioner skills short courses, and professional development support. A new strategy for 2024-26 will be presented to the executive sub-committee for approval in April, and will include free commercial acumen training for local government procurement practitioners.
<ul style="list-style-type: none"> Continue to explore the development of progressive, sustainable learning pathways, working with educational and/or cross-sector partners to address skills gaps, support career development, and attract new entrants to procurement 		<ul style="list-style-type: none"> The Academy and the Scottish Procurement & Property Directorate have co-designed a new Graduate Apprenticeship in Business Management with Procurement and Supply Chain Management with Glasgow Caledonian University (GCU). The university has advised that the programme is on track for a launch date of September 2024.



Value delivery: partnerships






Action	RAG status	Progress summary
<ul style="list-style-type: none"> Develop and implement a Scotland Excel partnership strategy which sets out objectives and plans for key partner relationships, assigns ownership, and <u>prioritises</u> activities that support the delivery of our five-year strategy. 		<ul style="list-style-type: none"> Scotland Excel's partnership strategy has been rescheduled to form part of the 2024-25 operating plan. In the meantime, all strategically important partnership relationships continue to be managed effectively.
<ul style="list-style-type: none"> Continue to build and develop relationships with the Scottish Government and <u>Centres</u> of Expertise to support the delivery of cross-sector procurement projects and programmes. 		<ul style="list-style-type: none"> Scotland Excel is continuing to work closely with the Scottish Government and other Centres of Expertise on a range of initiatives including social care, net zero, food, supply chain opportunities, and skills.
<ul style="list-style-type: none"> Continue to develop and deliver projects and activities with local government partners including COSLA, CIPFA Local Government Finance Directors, Solace, the Improvement Service, and the Digital Office for Scottish Local Government that benefit our mutual stakeholders. 		<ul style="list-style-type: none"> Scotland Excel continues to work closely with local government partners on a range of initiatives including providing procurement expertise for the transformation programme led by Solace/Improvement Service. Work is continuing with the Digital Office to support implementation of the shared digital alarm receiving centre (ARC) framework, with one council now live.
<ul style="list-style-type: none"> Implement Scotland Excel's third sector engagement strategy in support of local community wealth-building, helping them to reduce costs through associate membership where appropriate. 		<ul style="list-style-type: none"> A number of supported businesses have reported increased business and engagement following the event in November to help them build relationships with the local government procurement community. Scotland Excel also held a series of meetings with supported businesses during Q4 to explain the benefits of associate membership.
<ul style="list-style-type: none"> Continue to build relationships with education and academic partners to support the delivery of Scotland Excel's new Academy strategy. 		<ul style="list-style-type: none"> The Scotland Excel Academy continues to work with academic partners on the development learning programmes including SQA, Glasgow Caledonian University, and the City of Glasgow College.

Strategic enablers

Business Area	Commitment	RAG status	Progress summary
Corporate, Finance & ICT	<ul style="list-style-type: none"> Provide legal and financial support for exploring new business model options. 		<ul style="list-style-type: none"> This strategic enabler links to the value delivery objective on business models which has been removed from the current operating plan. Scotland Excel's existing business model supports the delivery of current strategic priorities.
	<ul style="list-style-type: none"> Develop a methodology and tool for monitoring and managing all rebates due from Scotland Excel frameworks. 		<ul style="list-style-type: none"> Work to update the modelling, mobilisation and management of rebates continues, and a rebate modelling tool is now being used by all category teams. A new Income and Finance Specialist role is being established to manage rebates and other non-requisition income.
	<ul style="list-style-type: none"> Monitor the effectiveness of Scotland Excel's hybrid working policy, proposing improvements which will benefit customers and staff. 		<ul style="list-style-type: none"> Scotland Excel's hybrid and flexible working policies have worked well throughout 2023-24. Monitoring is ongoing to ensure that these policies continue to benefit customers and staff.
	<ul style="list-style-type: none"> Implement a new five-year ICT strategy to support staff efficiency and increase digital delivery for customers. 		<ul style="list-style-type: none"> Scotland Excel's ICT strategy has been rescheduled to form part of the 2024-25 operating plan. Resources such as SharePoint are being rolled out to support the delivery of a new strategy.
	<ul style="list-style-type: none"> Continue to strengthen Scotland Excel's data management and reporting capability across a range of value measurements. 		<ul style="list-style-type: none"> Scotland Excel is continuing to improve data management and reporting, with work being aligned to the new performance management framework currently in development. A new role of Lead Commercial Analyst has been established to maximise the efficiency and effectiveness of complex social care data collation and analysis.
	<ul style="list-style-type: none"> Consider options for a future business intelligence strategy. 		<ul style="list-style-type: none"> Scotland Excel's business intelligence strategy was approved by the executive sub-committee in February 2024. The strategy covers the period from 2024-26 and is accompanied by an action plan to support delivery.

	<ul style="list-style-type: none"> Consider options for reducing Scotland Excel's carbon footprint. 		<ul style="list-style-type: none"> Options continue to be considered as part of the net zero action plan which involves staff from across the organisation.
Organisational Development	<ul style="list-style-type: none"> Implement Scotland Excel's people strategy and Investors in People plan by embedding personal development plans that supports organisational performance and individual career goals. 		<ul style="list-style-type: none"> Scotland Excel's Investors in People (IIP) midterm assessment took place in Q4. Recommendations from the review will be incorporated into plans for retaining Gold Standard accreditation at the next full assessment in 2025.
	<ul style="list-style-type: none"> Develop an approach to succession planning which to support career development and create a steady pipeline of talent at all levels. 		<ul style="list-style-type: none"> An approach to succession planning will now be developed as part of the 2024-25 operating plan. Organisational restructuring currently taking place will provide foundations for this approach.
	<ul style="list-style-type: none"> Build on Scotland Excel's commitment to training, ensuring all staff <u>have the opportunity to</u> acquire the skills required for the delivery of the new five-year strategy such as commercial acumen and climate change literacy. 		<ul style="list-style-type: none"> Scotland Excel staff continue to have access to a wide range of online and in-person training opportunities promoted via the staff intranet. Employees will take part in the new commercial acumen training programme which will be launched in 2024-25.
	<ul style="list-style-type: none"> Continue to develop and improve resources which support recruitment, <u>induction</u> and retention through a seamless and supportive employee journey. 		<ul style="list-style-type: none"> As part of Scotland Excel's commitment to continuous improvement of the employee journey, a development day for all line managers took place in March. The event provided managers with a range of tools to support their role and ensure a consistent approach across the organisation. A second event is being planned for the autumn.
	<ul style="list-style-type: none"> Research and explore options for developing an employment and training strategy that supports new entrants to public procurement. 		<ul style="list-style-type: none"> Scotland Excel has launched a new cycle of its two-year graduate programme with a recruitment campaign for four graduate trainees in March. A range of training courses which support new entrants to procurement continue to be available through the Scotland Excel Academy.
Engagement & Communication	<ul style="list-style-type: none"> Support the development and implementation of Scotland Excel's partnership strategy, including the use of stakeholder mapping and competitor modelling tools across the organisation. 		<ul style="list-style-type: none"> This strategic enabler links to the value delivery objective on the partnership strategy which now forms part of the 2024-25 operating plan.

	<ul style="list-style-type: none"> Implement the recommendations of Scotland Excel's value project to articulate and demonstrate the value of membership to customers 		<ul style="list-style-type: none"> Scotland Excel continues to explore ways to maximise value for members. This activity will be supported by the new performance management framework which will be introduced in 2024-25.
	<ul style="list-style-type: none"> Re-establish a customer satisfaction survey programme, and baseline satisfaction rates for future improvements. 		<ul style="list-style-type: none"> The delivery of a customer satisfaction programme now forms part of the 2024-25 operating plan to allow current operational and delivery changes to take effect. In the meantime, Scotland Excel continues to solicit and respond to customer satisfaction feedback.

Report Key	
	Project or activity not yet started
	Project or activity is currently stalled or significantly behind schedule
	Project or activity is progressing at a slower pace than anticipated and/or results have been weaker than expected
	Project or activity is progressing in line with expected/agreed timelines and results
	Project or activity completed

Report issued: May 2024

Appendix 4a – Community Benefits per Council 2023-2024

Council	Number of Community Benefits Reported	Total Number of Hours of Work Experience for School Pupils, College and University Students	Total Number of Apprenticeships Recruited to Deliver Contract	Total Number of Work Placements For Adults	Total Number of Volunteering Hours	Total Number of Employees Recruited to Deliver Contract	Total Monetary Value (£) of Other Community Benefits
TOTAL	730	8526.50	51.55	215.80	7551.49	380.73	£1,501,238
Aberdeen City Council	32	3388.00	1.05	0.00	140.00	23.70	£22,681
Aberdeenshire Council	40	0.00	0.10	0.00	0.00	3.50	£82,880
Angus Council	3	0.00	0.00	0.00	0.00	0.00	£4,132
Argyll & Bute Council	10	450.00	0.00	0.00	0.00	1.00	£4,900
Associate Member	54	351.00	2.10	0.00	80.00	13.75	£625,133
City Of Edinburgh Council	60	248.75	2.65	137.00	31.25	15.50	£128,413
Clackmannanshire Council	4	0.00	0.00	0.00	0.00	0.10	£72,660
Comhairle nan Eilean Siar	0	0.00	0.00	0.00	0.00	0.00	£0
Dumfries & Galloway Council	11	150.00	0.20	0.00	0.00	18.00	£8,270
Dundee City Council	11	250.00	0.25	0.00	3.00	0.80	£3,131
East Ayrshire Council	13	0.00	0.00	0.00	0.00	3.00	£13,699
East Dunbartonshire Council	11	0.00	0.00	0.00	0.00	3.10	£18,818
East Lothian Council	5	0.00	0.05	0.00	0.00	2.90	£3,622
East Renfrewshire Council	11	48.75	0.10	0.00	0.00	5.80	£19,945
Falkirk Council	19	0.00	4.00	0.00	0.00	14.20	£32,349
Fife Council	60	1784.50	1.75	4.80	0.00	21.10	£68,418
Glasgow City Council	67	154.60	17.70	0.00	69.04	79.69	£86,601
Highland Council	21	516.00	1.20	0.00	0.00	2.50	£27,740
Inverclyde Council	8	0.00	0.25	0.00	0.00	6.00	£1,526
Midlothian Council	8	0.00	0.10	0.00	0.00	0.80	£10,594
North Ayrshire Council	38	0.00	0.20	0.00	56.00	4.09	£28,594
North Lanarkshire Council	51	109.90	4.00	2.00	1.00	22.20	£44,364
Orkney Islands Council	0	0.00	0.00	0.00	0.00	0.00	£0
Perth & Kinross Council	25	0.00	0.00	0.00	0.00	12.50	£44,974
Renfrewshire Council	29	22.00	12.10	72.00	70.20	54.70	£29,786
Scottish Borders Council	12	105.00	0.05	0.00	0.00	2.40	£5,550
Shetland Islands Council	2	0.00	1.00	0.00	0.00	1.00	£0
South Ayrshire Council	23	0.00	0.00	0.00	905.00	2.10	£19,440
South Lanarkshire Council	56	708.00	1.00	0.00	6.00	35.30	£66,128
Stirling Council	17	240.00	0.00	0.00	6188.00	3.00	£4,840
The Moray Council	6	0.00	1.20	0.00	0.00	0.00	£10,458
West Dunbartonshire Council	12	0.00	0.00	0.00	2.00	1.20	£4,671
West Lothian Council	11	0.00	0.50	0.00	0.00	26.80	£6,923

Appendix 4b - Community Benefits Reported 2013-2024

Community Benefit Type	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	2023/2024	Total
No of Apprentices	9	92	49	18	52	34	37	26	41	49	52	459
No of New Jobs	78	43	29	53	146	280	249	340	432	296	381	2,327
No of Work Placements	0	5	6	17	30	107	43	47	39	14	216	524
Hours of Volunteering & Mentoring	95	377	1,279	1,570	1,637	803	853	608	607	3,815	7,551	19,195
Hours of Work Experience	5,305	28,214	16,734	7,852	2,541	667	10,360	19	1,292	15,411	8,527	96,922
Value of Other Community Benefits	£2,474	£16,550	£46,140	£87,814	£311,549	£437,443	£901,410	£858,590	£400,917	£783,214	£1,501,238	£5,347,339

**Appendix 5 - Planned Procurement - Frameworks due for renewal or extension by 31 March 2026 and;
New contract areas 2023/2024**

Schedule No.	Title	End Date
1419	Waste Disposal Equipment	31/03/2024
1422	Construction Materials	31/05/2024
1318	Care & Support	30/06/2024
0220	Organic Waste	30/06/2024
1020	Fostering	30/06/2024
1023	Sheriff Officers	30/06/2024
0622	Technology Enabled Care Goods	30/06/2024
2018	Community Meals	31/07/2024
1518	New Build Residential Construction	31/07/2024
1119	Demolition	31/07/2024
1919	Catering Sundries	31/07/2024
1220	Education Materials	31/07/2024
0420	Outdoor Play	31/07/2024
1918	Care Homes For Adults LD Inc Autism	15/09/2024
0423	Street Lighting Materials	31/10/2024
0222	Employability Services	30/11/2024
1321	Musical Instruments	30/11/2024
0721	Recycle And Refuse Containers	08/12/2024
1721	Social Care Agency Workers	15/01/2025
2019	Domestic Furniture and Furnishings	31/01/2025
1320	Energy Efficiency Contractors	31/01/2025
1221	Pest Control	31/01/2025
2717	Recyclable & Residual Waste	10/02/2025
1420	Social Care Case Management	14/02/2025

Schedule No.	Title	End Date
0320	Bitumen Products	28/02/2025
0820	Engineering Consultancy	17/03/2025
0720	Vehicle Parts	31/03/2025
0219	Secure Care	31/03/2025
0421	Supply Teacher And Others Bookings	31/03/2025
0920	Building Consultancy	18/04/2025
1219	Groceries & Provisions	30/04/2025
1921	Repair & Maintenance Of Catering Equipment	30/04/2025
1520	Waste Composition Analysis	08/06/2025
1821	Property Maintenance And Refurbishment	15/06/2025
2021	Water Coolers	06/07/2025
0921	Library Books And Textbooks	31/07/2025
1021	Digital Publications And Services	31/07/2025
0620	Education And Office Furniture	31/08/2025
0520	Online School Payments	19/09/2025
1122	Fire Safety Products	08/10/2025
0321	Heavy Vehicles	31/12/2025
0221	Tyres	31/12/2025
1022	First Aid	08/01/2026
0121	Vehicle And Plant Hire	20/02/2026
0521	Milk	28/02/2026
2222	Road Signage Materials	31/03/2026
1120	Frozen Foods	31/03/2026

New Contract	Forecast Delivery Date
LHEES (Local Heat and Energy Efficiency Strategies)	Aug-24
Security Operations Centre	Feb-25