

Scotland Excel

To: Joint Committee

On: 21 June 2019

**Report
by
Director Scotland Excel**

Annual Procurement Report

1 Introduction

Where a public organisation is required to prepare a procurement strategy or review an existing one, for example, it has an estimated total value of regulated procurement spend of £5 million or more (excluding VAT) in a financial year, it must also publish an annual procurement report. The Procurement Reform (Scotland) Act 2014 sets out what, as a minimum, each annual procurement report must contain.

The annual procurement report should be relevant and proportionate, providing transparency of its purchasing activities. The statutory guidance states that an annual procurement report must address all the matters contained in an organisations procurement strategy.

The annual procurement report must be published as soon as reasonably practicable after the end of the financial year. Scotland Excel's second annual procurement report to be published will be based on the 2018-2019 financial year (for Scotland Excel this is 1 April 2018 – 31 March 2019).

2 Annual Report on Procurement in Scotland

The 2014 Act also requires Scottish Ministers to publish an annual report on procurement activity in Scotland; the first such report was published on 4 April 2019. It provides an overview of public procurement activity and is informed by the individual annual procurement reports published by contracting authorities in Scotland. This report does not touch on all areas where public procurement can have an impact, but it does support increased transparency and visibility of public procurements.

The timing of the publication of individual annual procurement reports is an important consideration in the preparation of the Scottish Ministers' annual report on procurement activity in Scotland. This is because the Ministers' report will be based on information contained within annual procurement reports published by individual

contracting authorities.

Based upon experience of reports published by contracting authorities during 2018, annual procurement reports are expected to be published no later than five months following the end of the authority's financial year. For Scotland Excel this means the its annual procurement report for the 2018-2019 financial year will be published no later than the end of August.

3 Legislative Requirements

The Procurement Reform (Scotland) Act 2014 lists the minimum requirements that the annual procurement report must contain, 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) 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 report that Scotland Excel has prepared in order to meet the requirements of the Procurement Reform (Scotland) Act 2014 is given at Annex A.

5 Conclusion/Recommendation

Committee members are requested to note the content of this report and approve publication, on the Scotland Excel Website, of the Annual Procurement Report as given at Annex A.

Scotland Excel
Annual Procurement Report
(1 Apr 2018 – 31 March 2019)

June 2019

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Scotland Excel Annual Procurement Report 2018/19

Introduction

Scotland Excel is the Centre of Procurement Expertise for the local government sector. Established in 2008, we are a leading non-profit shared service funded by Scotland's 32 local authorities.

Our contract portfolio, the value of which exceeds £1bn, supports the delivery of social care, construction, roads, transport, environment, corporate, education and ICT services. A strategic approach ensures contracts are designed to encourage innovation, facilitate policy, support local economies and generate social value for communities.

Scotland Excel strictly adhere to their duties as laid down by the Procurement Reform (Scotland) Act 2014 ("the Act"). Section 18 of the Act mandates any public organisation who is required to publish a procurement strategy to prepare an annual procurement report.

This annual procurement report will review the latest Procurement Strategy published by Scotland Excel in June 2018 and evaluate the organisations procurement activity. The report further supports Scotland Excel's commitment to transparency within its procurement activity and documents our performance against our objectives and strategic targets.

Scotland Excel's current Procurement Strategy sets out the strategic direction for its procurement activity and details the context in which Scotland Excel will work to ensure that its procurement delivers value for money and directly contributes to the achievement of its aims and objectives. Together with its Sustainable Procurement Strategy and respective Category Strategies it reflects the Scottish Model of Procurement. It also demonstrates how Scotland Excel ensures it has considered the wider social, economic and environmental aims of procurement in a consistent manner as required by the sustainable procurement duty under the Act. Scotland Excel's Procurement Strategy is also clear on how it will contribute to meeting the general duties in the Act.

Scotland Excel has published its Annual Procurement Report on its website <http://www.scotland-excel.org.uk/>.

Section 1 Summary of Regulated Procurements Completed

Section 18(2) 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.

The principle of transparency requires an organisation to approach its public procurements in an open and inclusive manner. Scotland Excel has at present sixty-eight live framework agreements. These frameworks are aligned to Councils' requirements and are established on their behalf. Appendix 1- Part 1 provides a high-level summary of the regulated procurements Scotland Excel has completed between 1 Apr 2018 and 31 March 2019. As required Appendix 1 includes:

- The date of award
- The name of the supplier
- The subject matter
- Estimated value of the framework
- The start date
- The end date

In addition, Appendix 1 – Part 2 shows suppliers appointed to the dynamic purchasing system (DPS) established in 2018/19 for the Treatment and Disposal of Recyclable and Residual Waste.

Section 2 Review of Regulated Procurement Compliance

Section 17 of the Act requires all regulated procurements to be carried out in line with the organisations procurement strategy. Section 18(2) states 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”.

Prior to the commencement of any procurement exercise a commodity strategy is developed. Commodity strategies are reviewed as part of Scotland Excel’s established governance procedures. This involves review at contract steering groups, by various members of management to ensure commodity strategies reflect and adhere to the values and principles set out in the overall Procurement Strategy. Throughout the Procurement Journey individual commodity exercises are reviewed, evaluated and monitored at contract steering groups before proceeding to the next stage in the procurement process. Commodity strategies reflect the Scotland Excel Procurement Strategy and ensure that procurement exercises follow a journey that embeds our organisations principles, values and objectives.

The Contract Steering Group is responsible for governance of each appointed milestone of the procurement process from contract initiation through to contract termination/expiration in line with the Governance Gateways (outlined in bold in Appendix 2).

These Governance Gateways are designed to accommodate the EU Open and Restricted Procedures and Regulated Procurements as defined by the Act.

This methodology represents and ultimately ensures that all regulated procurements align with the Procurement Strategy. Furthermore, our approach to strategic procurement in this way maximises the added value potential in each and every procurement exercise.

Scotland Excel has reviewed the commodity strategy template to incorporate best practice and it includes updated consideration of areas such as Fair Work Practices and Equality. We continually strive to strengthen and develop our internal governance structures and recognise that the strategy development stage is crucial in the creation of our framework agreements. It is at this stage that we conduct extensive market consultation and stakeholder engagement to promote involvement and undertake comprehensive market analysis.

Key success factors are established in consultation with our members. Financial savings targets for each procurement exercise are projected at the strategy stage and suppliers are obliged to provide detailed spend information. Through effective contract management, quantitative and qualitative aspects are monitored and reviewed. Performance against our strategy and objectives for 2018/19 is given at Appendix 3.

Section 3 – Community Benefits Summary

Section 18(2) 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”.

Community benefit clauses provide a means of achieving sustainability in public contracts. They include targeted recruitment and training, small business and social enterprise development and community engagement. The requirement to include community benefits in the delivery of goods and services is an integral element within Scotland Excel frameworks.

Scotland Excel incorporate community benefits in its procurement activities to promote and encourage sustainability. It is widely recognised that in doing so we contribute to the delivery of social and environmental benefits. Tenderers are required to make a community benefits submission in respect of the spend they will receive through access to the relevant framework and this is monitored throughout the duration of the framework agreement. The system used to capture and record community benefits has been reviewed and fully addresses the requirements of the statutory guidance made under the Procurement Reform (Scotland) Act 2014, and supports the ongoing drive to deliver sustainable procurement.

Community benefits information is collected from suppliers on a six-monthly basis. Scotland Excel’s process requires suppliers who receive spend, in excess, of £50,000 over the preceding two quarters to produce a detailed breakdown of the community benefits they provide. The information provided for the last financial year (2018/19) has been collated and is as follows:

No. of Apprentices	34
No. of New Jobs	280
No. of Work Placements	107
Hours of Volunteering	803
Hours of Work Experience	667
Value of other Community Benefits	£437,443

This return is vital for the reporting of social and environmental benefits resulting from the procurement activity conducted by Scotland Excel. Our methodology provides a platform for suppliers to demonstrate the commitment they make at the tender stage and to realise their full economic potential. 'Other Community Benefits' encompass a range of benefits including donations and sponsorships of various clubs and community organisations. From our most recent community benefit return results continue to be extremely positive and demonstrates Scotland Excel's commitment to maximising community benefits from frameworks for works, goods and services in which Scotland Excel members have an interest. This approach evidences fulfilment of community benefits and recognises community benefits should improve the economic, social or environmental wellbeing of specific local authority areas.

Additionally, community benefits are reviewed with suppliers at contract management review meetings and routinely reported to local authority procurement managers.

Section 4 – Supported Businesses Summary

Section 18(2) 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.

Supported businesses are defined 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”*. Contracts may be reserved for those businesses meeting these criteria

At Scotland Excel the involvement of supported businesses in regulated procurements is considered at the strategy development stage. As commodity strategies are mandatory for all regulated procurements undertaken by Scotland Excel, the involvement of supported businesses is therefore considered in all regulated procurements.

Within the portfolio of contracts reviewed in 2018/19 no contracts were reserved for supported businesses in 2018/19. However in line with our sustainable procurement duty and procurement strategy all procurement exercises undertake a sustainability assessment. Due diligence in this way means evaluations are conducted to determine ways in which sustainability, including the use of supported businesses can be maximised.

We are always looking for appropriate ways to include supported businesses in our frameworks as demonstrated by the appointment Scotland's Bravest Manufacturing Company within our Roads Signage Materials Framework.

With a view to creating opportunities specifically for supported businesses within the furniture and furnishings market as part of our latest generation domestic furniture and furniture framework marked we engaged with the British Association of Supported Employment (BASE) and this resulted in substantial sub-contracting opportunities within the supply chain.

On the Personal Protective Equipment Framework (PPE) framework, five suppliers have partnership relationships with three supported businesses.

Scotland Excel firmly believe that supported businesses can make a key contribution to local impact, are vital to the Scottish economy and that they provide essential job opportunities for disabled and disadvantaged people within our communities which enable them to become more independent, while also delivering a range of excellent goods and services.

Scotland Excel will continue to work with councils and suppliers to promote working relationships with their local supported business.

Section 5 – Future Regulated Procurements Summary

Section 18(2) 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 uphold the values of transparency and proportionality to encourage competition and to achieve better value for money. Scotland Excel will continue to engage and communicate appropriately, to give suppliers advance notice of future opportunities.

Scotland Excel plans to commence around forty-four regulated procurements over the next two financial years however these are subject to change. Details of these anticipated contract requirements are shown in Appendix 4.

Section 6 – Other Content for Consideration

At Scotland Excel, we are leaders of change. Over the past eleven years, we have helped to raise the profile of procurement in local authorities by championing its potential to shape markets, support policy priorities and, ultimately, ensure the sustainable delivery of the services that every community needs.

Our services are designed to help councils meet the twin challenges of reducing budgets at a time of growing demand. Collaborative procurement increases efficiency and ensures money is saved to protect front line services. By working together through Scotland Excel, councils can realise a host of social, economic and environmental benefits from their spend.

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. We represent the sector at a national level on all matters relating to public procurement and provide procurement support for a range of national sector initiatives including the Scottish Government’s Affordable Housing Supply Programme (AHSP).

Our vision is: To provide innovative, transformative solutions for local and national public services across Scotland.

Our Mission is: To make the most of our strategic procurement expertise and our experience of developing collaborative solutions which support better outcomes for Scotland’s people and communities through early intervention and the delivery of sustainable public services

The following principles, which were developed by staff from across the organisation, guide our approach to our work.

- Professional - We establish goals and objectives to achieve excellence and demonstrate leadership in everything we do.
- Courageous - We listen with an open mind and respond honestly and constructively.
- Respectful - We achieve the best possible outcomes through our determination, resilience and innovation.
- Integrity - We are transparent and fair in all our actions securing trust and building confidence.

At Scotland Excel, we are committed to demonstrating innovation and continuous improvement in everything we do. We are delighted to have won a number of awards for our work. We also hold a number of accreditations which reflect our commitment to best practice in procurement, organisational development and workforce matters.

CIPS Corporate Certification Standard - This award signifies that we have all the procurement governance mechanisms in place for effective supply assurance and compliance.

Investors in People (IIP) - 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 of £9.00 an hour set independently and updated annually, calculated according to the basic cost of living in the UK.

Appendix 1
Procurements Completed

Procurements completed (by start date) 01 Apr 2018 - 31 Mar 2019

Award Date	Short Contract Title	Total Contract Value	Start Date	End Date	Supplier Name	Sch No.
12/04/2018	Fire Safety Products	£10,000,000.00	16/04/2018	15/04/2020	Chubb Fire & Security Limited	1617
					Core Fire Limited	1617
					Invincible Security Ltd	1617
					M & S Fire Protection (glasgow) Limited	1617
					Walker Fire (uk) Ltd	1617
25/04/2018	Children's Residential	£421,600,000.00	01/05/2018	30/04/2022	A Wilderness Way	0517
					Abbeyfield Lodge Limited	0517
					Aberdeen Association Of Social Services (trading As Vsa)	0517
					Aberlour Child Care Trust	0517
					Applied Care And Development Limited	0517
					Archway (Respite Care & Housing) Limited	0517
					Ardfern Ltd Ta Ardfern Learning Centre Ta Ardfern School	0517
					Bachlaw Limited	0517
					Balnacraig School	0517
					Barnardo's	0517
					Cairn Mhor Childcare Partnership Ltd	0517
					Camphill Rudolf Steiner Schools Limited	0517
					Capability Scotland	0517
					Care 4 Children Residential Services Ltd	0517
					Care Visions Group Limited	0517
					Church Of Scotland (trading As Crossreach)	0517
					Common Thread Limited	0517
					East Park School	0517
					Harmeny Education Trust Ltd	0517
					Hillcrest Childrens Services Ltd	0517
					Hillside School (aberdour) Limited	0517
					House Of Falkland Ltd Ta Falkland House School	0517
					Inspire Scotland Ltd	0517
					Julia Stewart Ltd	0517
					Kibble Education & Care Centre	0517
					Mirren Park Ltd Ta Mirren Park School	0517
					Moore House School Limited	0517
					Priory Education Services Limited	0517
					Quarriers	0517
					Radical Services Limited	0517
					Roc Northwest Limited	0517
					Rossie Young Peoples Trust (Rossie Secure Accommodation Services)	0517
					Royal Blind Asylum & School	0517
					Scottish Autism	0517
					Seamab	0517
					Sense Scotland	0517
					Spark Of Genius (training) Limited	0517
					Speyside Trust	0517
					St Philips School Plains	0517
					Stepdown	0517
					The Governors Of The Donaldson Trust Known As The Donaldson Trust	0517
					The Mungo Foundation	0517
					The New School Butterstone	0517
					The Scottish Centre For Children With Motor Impairments	0517

					Up-2-us	0517
					Young Foundations Known As The Red House	0517
01/06/2018	Power Tools	£2,500,000.00	17/06/2018	16/02/2021	Cmt Equipment Ltd T/a Cmt Group	0218
					Decco Limited t/a White Milne	0218
					Gibb & Beveridge (engineering Agencies) Ltd	0218
					J. G. Martin Plant Hire Limited	0218
					Jewsons (May Trade Under Other Name for Each Contract)	0218
					Kelvin Powertools Ltd	0218
					MacGregor Industrial Supplies Ltd	0218
					S.i.i.s. Limited	0218
18/07/2018	Roadstone	£20,000,000.00	01/07/2018	30/06/2022	Beatsons Building Supplies Ltd	2817
					Breedon Northern Limited	2817
					Cemex UK Materials Limited	2817
					D. Geddes (contractors) Limited	2817
					Fleximix Concrete Ltd	2817
					Hillhouse Quarry Group Ltd	2817
					John Gunn & Sons Limited	2817
					Leiths (scotland) Ltd	2817
					Macdonald Groundworks Ltd	2817
					Pat Munro (alness) Limited	2817
					Patersons Of Greenoakhill Limited	2817
					Tarmac Trading Limited	2817
					Tillicoultry Quarries Limited	2817
					William Thompson & Son (dumbarton) Limited	2817
01/07/2018	Salt for Winter Maintenance	£65,000,000.00	01/07/2018	30/06/2022	Compass Minerals Uk Ltd	2917
					Delmon Uk Limited	2917
					Glasdon UK Ltd	2917
					Icl Uk (sales) Limited	2917
					J C Peacock & Co Ltd (T/A Peacock Salt)	2917
					Maklad International Limited	2917
					Salt And Grit Solutions Limited	2917
					The Irish Salt Mining & Exploration Company (T/A Salt Sales Company)	2917
					Wm Hamilton & Sons Limited	2917
27/07/2018	Social Care Agency Workers	£80,000,000.00	01/08/2018	31/07/2022	Ailsa Care Services Limited	2017
					Asa International Limited, Trading As Asa Recruitment	2017
					Asphalia Holdings T/a Care Field	2017
					Black And Black Recruitment Ltd	2017
					Brightwork Limited	2017
					Jobs & Co Limited	2017
					Randstad Public Services Limited	2017
					Reed Specialist Recruitment Limited T/a Reed Community Care	2017
					Sanctuary Personnel Limited	2017
					Scp Recruitment Limited (social Care Professionals)	2017
					Search Consultancy Ltd	2017
					Service Care Solutions Limited	2017
					Sugarman Health And Wellbeing Ltd	2017
					The Social Care Community Partnership Limited (tsccp)	2017
					Tripod Partners Limited	2017
19/10/2018	Boiler Maintenance	£40,000,000.00	14/09/2018	13/09/2020	City Building Contracts LLP (RSBi)	2217
					City Technical Services (uk) Ltd	2217
					Everwarm Limited	2217
					Gas Call Services Ltd	2217

					James Frew Limited	2217
					O'neil Gas Services Limited	2217
					Richard Irvin & Sons Ltd (t/a Richard Irvin Energy Solutions)	2217
					Saltire Facilities Management Limited	2217
					Wrb Gas (contracts) Limited	2217
12/09/2018	Road Maintenance Materials	£10,000,000.00	17/09/2018	31/08/2022	Broxap Ltd	3017
					Bunzl UK Ltd (T/A Greenham)	3017
					Fabrikat (nottingham) Ltd	3017
					Fleming and Company (Machinery) Ltd	3017
					Geveko Markings Uk Ltd	3017
					Glasdon UK Ltd	3017
					Gph Builders Merchants Limited	3017
					Grafton Merchating Gb Ltd	3017
					Hugh Logan Plant & Engineering Services Ltd	3017
					Jack Coupe & Sons Limited	3017
					James Cowie And Co Ltd	3017
					Keyline Builders Merchants Limited	3017
					Lc Packaging Uk Ltd	3017
					Mallatite Limited	3017
					Marwood Electrical Co Ltd	3017
					P. F. Cusack (tools Supplies) Limited	3017
					Saint-gobain Building Distribution Limited	3017
					Scotia Supply Company Ltd	3017
					Traffic Management Products Ltd	3017
08/08/2018	Fresh Meat, Cooked Meats & Fresh Fish	£40,000,000.00	01/10/2018	30/09/2021	Brake Bros Ltd	0118
					Campbell Brothers Limited	0118
					Campbells Prime Meat Ltd	0118
					Gordon McWilliams (Aberdeen) Ltd	0118
					J Pieroni & Sons Ltd	0118
					McLays Ltd	0118
					Pdf (carlisle) Ltd T/a Pioneer Foodservice	0118
12/09/2018	First Aid Materials	£8,000,000.00	01/10/2018	30/09/2021	Aero Healthcare Ltd	1018
					Arco Ltd	1018
					Bunzl UK Ltd (T/A Greenham)	1018
					Cardiac Science Holdings (uk) Ltd	1018
					Crest Medical Ltd T/a Wallace Cameron International	1018
					Fast-aid Products Ltd	1018
					Prometheus Alphamed Ltd	1018
					Sp Services (uk) Ltd	1018
01/08/2018	Street Lighting Materials	£140,000,000.00	01/10/2018	31/07/2021	Asd Lighting Plc	2617
					Batt Cables Public Limited Company	2617
					C. U. Lighting Limited	2617
					City Electrical Factors Ltd	2617
					Cleveland Cable Company Ltd	2617
					D.w. Windsor Limited	2617
					Fabrikat (nottingham) Ltd	2617
					Glasdon UK Ltd	2617
					Indo Lighting Limited	2617
					James M Anderson Ltd	2617
					Light And Energy Distribution Limited	2617
					Mallatite Limited	2617
					Marwood Electrical Co Ltd	2617
					Orangetek Ltd	2617

					Philips Lighting Uk Limited	2617
					Simmons Limited	2617
					Snapfast	2617
					Street Lighting Supplies & Co Ltd	2617
					The Aluminium Lighting Company Ltd	2617
					Traffic Management Products Ltd	2617
					Trt Lighting Limited	2617
					Uk Electric Limited T/a Bei Lighting	2617
					Urbis Schreder	2617
					Zeta Specialist Lighting Limited	2617
					Zg Lighting (uk) Limited	2617
11/11/2018	Washroom Solutions and Sanitary Products	£14,000,000.00	01/10/2018	30/09/2022	Cannon (OCS Group UK Ltd)	3217
					Co-an Uk Ltd	3217
					Greenleaf Hygiene Solutions (scotland) Ltd	3217
					Healthcare Environmental Services Ltd	3217
					Hey Girls Cic	3217
					Rentokil Initial Services Limited T/a Initial Washroom Hygiene	3217
23/11/2018	Commercial Catering Equipment	£16,000,000.00	01/11/2018	31/10/2021	Airedale Catering Equipment Limited	1118
					Brake Bros Ltd	1118
					Electrical Catering Services Limited	1118
					Fast Fixx	1118
					Instock Disposables Ltd	1118
					Itw Limited	1118
					Jla Limited	1118
					Lovat's Catering Engineering Services Ltd T/a Lovat's Group	1118
					Meiko Uk Limited	1118
					Scomac Catering Equipment Ltd	1118
					Stephens Catering Equipment Company Limited	1118
					The Acme Facilities Group Limited	1118
					Victor Manufacturing Limited	1118
19/11/2018	Road Signage Materials	£5,000,000.00	01/12/2018	30/11/2021	Ansko Signs Ltd	1418
					Coeval Ltd	1418
					Eurosigns (uk) Ltd	1418
					Limelight Signs Ltd	1418
					Mallatite Limited	1418
					Marwood Electrical Co Ltd	1418
					P. F. Cusack (tools Supplies) Limited	1418
					Royal British Legion Industries Ltd T/a Scotland's Bravest Manufacturing Company	1418
					Street Lighting Supplies & Co Ltd	1418
					Swarco Traffic Ltd	1418
					Twm Traffic Control Systems Ltd	1418
02/12/2018	Vehicle Purchase RM6060	£20,000,000.00	02/12/2018	01/12/2022	Audi Uk	0201
					Bmw (uk) Ltd	0201
					Citroen UK Ltd	0201
					Evobus (uk) Ltd	0201
					Fiat Group Automobiles Ltd	0201
					Ford Motor Company Ltd	0201
					General Motors UK Ltd (T/A Vauxhall)	0201
					Hyundai Motor Uk Ltd	0201
					Isuzu Truck (UK) Ltd	0201
					Iveco Ltd	0201
					Jaguar Landrover Ltd	0201

					Kia Motors (u K) Ltd	0201
					London Ev Company	0201
					MAN Truck & Bus UK Ltd	0201
					Mercedes-benz Cars Uk Limited	0201
					Mercedes-benz Vans Uk Limited	0201
					Nissan Motor (GB) Ltd.	0201
					Nu-Track Ltd	0201
					Peugeot Motor Company Plc	0201
					Renault Trucks Uk Ltd	0201
					Renault UK Ltd	0201
					Seat	0201
					Skoda Auto	0201
					Ssangyong Motor Uk Ltd.	0201
					Subaru (uk) Ltd	0201
					Suzuki Gb Plc	0201
					The Colt Car Company Ltd T/a Mitsubishi Motors	0201
					Toyota (gb) Plc	0201
					Toyota Gibraltar Stockholdings Ltd	0201
					Volkswagen Commercial Vehicles	0201
					Volkswagen Group United Kingdon Limited Trading As	
					Volkswagen Passenger Cars	0201
					Volvo Car Uk Ltd	0201
02/12/2018	Vehicle Purchase RM6060 (Leasing)	£20,000,000.00	02/12/2018	01/12/2022	Audi Uk	0201b
					Bmw (uk) Ltd	0201b
					Citroen UK Ltd	0201b
					Evobus (uk) Ltd	0201b
					Fiat Group Automobiles Ltd	0201b
					Ford Motor Company Ltd	0201b
					General Motors UK Ltd (T/A Vauxhall)	0201b
					Hyundai Motor Uk Ltd	0201b
					Isuzu Uk Ltd	0201b
					Iveco Ltd	0201b
					Jaguar Landrover Ltd	0201b
					Kia Motors (u K) Ltd	0201b
					London Ev Company	0201b
					MAN Truck & Bus UK Ltd	0201b
					Mercedes-benz Cars Uk Limited	0201b
					Mercedes-benz Vans Uk Limited	0201b
					Nissan Motor (GB) Ltd.	0201b
					Nu-Track Ltd	0201b
					Peugeot Motor Company Plc	0201b
					Renault Trucks Uk Ltd	0201b
					Renault UK Ltd	0201b
					Seat	0201b
					Skoda Auto	0201b
					Ssangyong Motor Uk Ltd.	0201b
					Subaru (uk) Ltd	0201b
					Suzuki Gb Plc	0201b
					The Colt Car Company Ltd T/a Mitsubishi Motors	0201b
					Toyota (gb) Plc	0201b
					Toyota Gibraltar Stockholdings Ltd	0201b
					Volkswagen Commercial Vehicles	0201b
					Volkswagen Group United Kingdon Limited Trading As	
					Volkswagen Passenger Cars	0201b
					Volvo Car Uk Ltd	0201b
23/11/2018	Technology Enabled Care	£25,200,000.00	01/01/2019	31/12/2019	Buddi Limited	3117
					Cair (uk) Ltd	3117

					Chubb Systems Limited	3117
					Communicare247 Ltd	3117
					Doro Ab	3117
					Its Designs Ltd Trading As Alert-it	3117
					Just Checking Ltd	3117
					Kinetik Medical Devices Ltd	3117
					Possum Limited	3117
					Solon Security Limited	3117
					Spie Scotshield Limited	3117
					Telealarm Europe Gmbh	3117
					Tunstall Healthcare (UK) Limited (T/A Tunstall Electronics)	3117
					Tynetec Ltd	3117
08/01/2019	Hot Beverages	£4,000,000.00	14/01/2019	13/01/2022	Bewley's Tea And Coffee Uk Limited	1618
					Brodie Melrose Drysdale & Co Ltd	1618
					Caber Coffee Limited	1618
					Cg Coffee Ltd	1618
					Coffee Conscience Ltd	1618
					Early Bird Catering Ltd	1618
					Eden Springs Uk Ltd	1618
					Excel Vending Ltd	1618
					Ipex Investments Limited T/a Capital Vending	1618
					Karing International Limited	1618
					Lyreco Uk Limited	1618
					Matthew Algie & Company Limited	1618
					Myrtle Coffee Services Ltd	1618
					Scotbev Supplies Limited	1618
					Tchibo Coffee International Limited	1618
					Templeman Retailing & Vending Ltd	1618
					The Loch Ness Coffee Company Limited	1618
					We Love Coffee Ltd	1618
08/01/2019	Energy Advice	£4,000,000.00	14/01/2019	13/01/2022	Argyll, Lomond And The Islands Energy Agency (alienergy)	1718
					Changeworks Resources For Life	1718
					Energy Agency	1718
					Greener Kirkcaldy Ltd	1718
					Mpc Energy Ltd	1718
					Scarf	1718
					Social Enterprise Direct	1718
					The Wise Group	1718
					Tighean Innse Gall Limited	1718
21/02/2019	Recyclable & Residual Waste	£200,000,000.00	11/02/2019	10/02/2024	A & M Smith Skip Hire Limited	2717
					Accident Repair Centre (scotland) Limited Trading As Arc Fleet Services	2717
					Acre Industrial & Cleaning Services Ltd	2717
					Associated Waste Management Limited	2717
					Avondale Environmental Ltd	2717
					Aw Jenkinson (woodwaste) Limited	2717
					Ayrshire Waste Management Limited	2717
					Barr Environmental Ltd	2717
					Biffa Waste Services Ltd.	2717
					Binn Skips Ltd.	2717
					Blythswood Care	2717
					Buchanan Skip Hire Ltd.	2717
					Changeworks Recycling Limited	2717
					Dalton Demolition Recycling Ltd	2717
					Doherty And Lafferty Ltd	2717

					Dow Group Limited	2717
					Eis Waste Services Limited	2717
					Enva Scotland Limited	2717
					Enviroclean (scotland) Ltd	2717
					Fcc Recycling (uk) Limited	2717
					Geminor Uk Limited	2717
					Gogar Services Limited	2717
					Green Circle Polymers Limited	2717
					J & A Young (Leicester) Ltd	2717
					J & B Recycling Limited	2717
					J & M Murdoch & Son Ltd	2717
					John Graham (metals) Limited	2717
					Levenseat Ltd	2717
					Locheil Logistics Limited	2717
					Lowmac Alloys Ltd	2717
					Mvv Enironment Limited	2717
					Nathans Waste Savers Ltd	2717
					Oakbank Waste Management Limited	2717
					Palm Recycling Ltd	2717
					Patersons Of Greenoakhill Limited	2717
					Recycling Lives Limited	2717
					Regen Waste Ltd	2717
					Resource Efficient Solutions Llp	2717
					Robertson Metals Recycling Limited	2717
					Safety-kleen U.k. Limited	2717
					Saica Natur Uk Limited	2717
					Scotwaste Recycling Limited	2717
					Smurfit Kappa Uk Ltd	2717
					Stobart Biomass Products Limited	2717
					Suez Recycling And Recovery Uk Ltd	2717
					Timberpak Ltd	2717
					Upm Kymmene Limited	2717
					Urm (uk) Limited	2717
					Viridor Waste Management Ltd	2717
					Ward Recycling Limited	2717
					William Munro Construction (highland) Ltd	2717
					William Thompson & Son (dumbarton) Limited	2717
					Wood Recyclability Ltd	2717
					Wrc Recycling Limited	2717
					Wyllie Recycling Limited	2717
13/03/2019	Light and Heavy Plant	£40,000,000.00	01/03/2019	28/02/2023	Balgownie Limited	0818
					Bomag (great Britain) Limited	0818
					Bryson Tractors Limited	0818
					Finning (uk) Ltd.	0818
					Fraser C Robb Limited	0818
					Groundwater Lift Trucks Limited	0818
					Hamilton Bros (engineering) Limited	0818
					Indespension Ltd	0818
					Lloyd Limited	0818
					Powerwasher Services Ltd	0818
					R & L Miller Limited	0818
					Ravenhill Limited	0818
					Reid Hydraulic Services Limited	0818
					Scot Jcb Limited	0818
					Vantech Engineering Services Limited	0818
					Young, Plant And Equipment Sales Limited	0818

26/04/2019	Grounds Maintenance Equipment	£24,000,000.00	01/03/2019	28/02/2022	Agricar Ltd.	0918
					Agrovista Uk Limited T/a Terra Firma (scotland)	0918
					Alex Mcdougall (mowers) Limited	0918
					Balgownie Limited	0918
					Bryson Tractors Limited	0918
					Fairways (gm) Ltd	0918
					Frank Nicol Farm & Garden Machinery Ltd	0918
					Fraser C Robb Limited	0918
					Gammies Groundcare Limited	0918
					Garden Machinery & Small Engine Services	0918
					Hamilton Bros (engineering) Limited	0918
					Henderson Grass Machinery Ltd	0918
					Henry Sheach Lawnmower Services Limited	0918
					J & S Montgomery Limited	0918
					James A. Cuthbertson, Limited	0918
					Lloyd Limited	0918
					Mts Nationwide Limited	0918
					Nairn Brown (glasgow) Limited	0918
					Ransomes Jacobsen Limited	0918
					Ravenhill Limited	0918
Reesink Turckare Uk Limited	0918					
Rickerby Limited	0918					
Simon Tullett Machinery Company Limited	0918					
Spaldings Limited	0918					
The Double A Trading Company Limited	0918					
Thomas Sherriff And Company Limited	0918					
20/03/2019	Janitorial Products	£48,000,000.00	01/03/2019	28/02/2023	Alliance Disposables Ltd	1218
					Arrow County Supplies Limited	1218
					Bunzl Uk Limited T/a Bunzl Cleaning And Hygiene Supplies	1218
					Hci Supplies Llp	1218
					Instock Disposables Ltd	1218
					The Guthrie Group Ltd	1218
					Unico Ltd	1218

Appendix 1 – Part 2
 Appointments to DPS
 for

Treatment and Disposal of Recyclable and Residual Waste

New Entrants

Service Provider Name	Lots Approved	Effective Date
Blythswood Care	Lots 9 and 11	21st March 2019
Dalton Demolition Recycling Ltd	Lot 7	10th April 2019
EIS Waste Services Ltd	Lots 1-17 and 19-22	25th April 2019
Oakbank Waste Management Limited	Lots 1-10	17th May 2019
Robertson Metals Recycling Ltd	Lots 4 and 7	5th April 2019
UPM Kymmene (UK) Limited	Lots 1-2 and 10	22nd March 2019
URM (UK) Limited	Lot 3	25th March 2019

New Offers

Service Provider Name	Additional Lots Approved	Effective Date
A&M Smith Skip Hire Ltd	11-13, 15 and 21	15th March 2019
Avondale Environmental Ltd	11,13 and 17	15th March 2019

Appendix 2

Governance (Procurement Process) Gateways

Contract Steering Group – Process Gateways	
	Process Stage
1	Contract Initiation
2	Market Research and Analysis
3	Communicate Strategy Pack to UIG for Review
4	Strategy Approved
	4a Initial Approval
	4b. Alignment with overall corporate objectives
	4c Approach for Participation & Benchmarking
	4d. Sustainable Procurement Duty
	4e. Authorise release to UIG & CPM's for information with benchmarking requests
5	Draft PQQ
6 -17	PQQ Approved (sub -stages subject to use of Restricted Process)
18	Tender Documents Approved
	18a Overall Tender Approved
	18b Approved that Strategy Requirements met
	18c Evaluation Methodology and Weightings Approved
19	ITT Issued via PCS and benchmarking templates to Councils
20	Tender Period (Incl Clarifications)
21	Tender Return Date - Any Extension?
22	Tenders Opened and Recorded
23	Tender Analysis Evaluation
24	Tender Evaluation Approved (includes sub stages 24a-24e)
25	Prepare Sub Executive Committee Report
26	PTN Approved
27	Conduct PTN
28	Executive Sub-Committee Report Approved
29	Executive Sub-Committee Authorisation to Award
30	Prepare and Issue Standstill Letters
31	Standstill Period
32	De-brief Unsuccessful Tenderers
33	Standstill Period Expired
34	Prepare Contract Award Letters
35	Contract Award Letters Issued
36	Contract Award Notice Approved
37	Contract Award Notice Published
38	Mobilisation Implementation Plan
39	Contract Start Date
40	Contract Management Annual Review
	40a Overall CM Report Approved
	40b Approved Strategy Requirements/Agreed Variations met
	40c Next Steps Plans Approved
41	Extension Reports subject to terms of F/work (incl Approval Requests)

Appendix 3

Performance against our strategy, operating plan and objectives for
2018/19

Review of Regulated Procurement - Performance against our strategy, operating plan and objectives for 2018/19

1. Purpose of the report

In June 2018, Scotland Excel's Joint Committee approved a new five-year corporate strategy which is supported by annual operating plans. This report presents the organisation's performance against the Operating Plan 2018-19.

2. Reporting methodology

Progress reports are produced quarterly to track Scotland Excel's performance against operating plan commitments. Reports are produced at the end of each quarter and submitted to Executive Sub-Committee meetings. Half yearly and annual reports are also submitted to Joint Committee meetings.

The reports summarise the progress made against operating plan commitments and uses a 'traffic light' symbol to provide a guide to the status of each activity. This guide was revised in 2018-19 to include symbols to indicate projects or activities which have not yet started, and projects or activities which have been completed:

	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

The report also tracks performance against thirteen key performance indicators (KPIs) linked to strategic outcomes.

3. Performance

The majority of commitments in the operating plan are progressing in line with plans and are indicated as green within the report. Most of these relate to major projects which span multiple years, or are ongoing business activities which are strategically important to the organisation and which will appear in operating plans throughout the five year period of the current strategy.

Seven activities are progressing more slowly than anticipated, predominantly due to external factors, and these are indicated as amber within the report. Scotland Excel will deliver these commitments during 2019-20 and take action to mitigate the impact of any external factors which are delaying progress.

Seven commitments were completed during 2018-19 and are indicated as black within the report.

Nine commitments are indicated as white and will commence during 2019-20. Most of these activities have dependencies on the outcome of other commitments that are still in progress.



Operating Plan

2018 – 2019

Year End Report

Goal 1: Shaping the delivery of innovative public services

Strategic Objective	Commitment	RAG status	Progress summary
1.1 Deliver a programme of collaborative procurement to support early intervention and the delivery of public services	<ul style="list-style-type: none"> Develop plans which support direct engagement with local authority services to identify new collaborative procurement opportunities 		<ul style="list-style-type: none"> Scotland Excel has continued to engage directly with stakeholders in local authority services throughout 2018-19, particularly where funding has been secured to meet specific requirements such as the new build housing framework and the new social care frameworks.
	<ul style="list-style-type: none"> Complete the sourcing strategy and initiate the tender process for a new build housing framework on behalf of participating local authorities 		<ul style="list-style-type: none"> The first stage of a two-part tender process has been concluded for the new build housing framework and 26 contractors have been invited to participate in the second stage. The return date for submissions is early May 2019, and tender evaluations will take place in May and June.
	<ul style="list-style-type: none"> Implement a procurement strategy for older people care home services for that provides choice, continuity of care and innovation in service delivery 		<ul style="list-style-type: none"> The implementation of the sourcing strategy has been delayed to allow for further discussions with the sector. Scotland Excel, Scottish Care and the Care Inspectorate are working together to ensure that the checks set out in the sourcing strategy are conducted by the most appropriate organisation.
	<ul style="list-style-type: none"> Implement the procurement strategy for adult care and support services and secure sustainable funding for ongoing delivery as part of the social care portfolio 		<ul style="list-style-type: none"> Following successful consultation events on the service specification for care and support, a draft specification is now with local authorities and providers for review. A technical group has been established to support the development of procurement documents, and will meet next quarter to look at the terms, conditions and approach to rates for the framework.
	<ul style="list-style-type: none"> Continue to pursue funding to deliver proposals which support the expansion of early learning and childcare provision 		<ul style="list-style-type: none"> Funding has been secured for Scotland Excel to produce guidance, template procurement documents, and terms and conditions to support the expansion of early learning and childcare provision. Work is now underway to deliver this project, with the guidance documents due to be published in April 2019.

	<ul style="list-style-type: none"> • Develop and implement contract and supplier management (CSM) and key supplier management (KSM) programmes which monitor and enhance the performance of Scotland Excel contracts 		<ul style="list-style-type: none"> • The new CSM programme is now in place for 26 contracts. Contracts are segmented into 12 CSM levels to incorporate assessment of additional risk factors which ensure an appropriate level of oversight for each contract. Scotland Excel is continuing to work with the Commercial UIG steering group on the development of a KSM programme. Six key suppliers have been identified, and will be shared with other sectors to ascertain their interest in participating in the programme.
	<ul style="list-style-type: none"> • Identify opportunities to lead and/or participate in national cross-sector procurement opportunities and initiatives with partners in health, further and higher education, and central government 		<ul style="list-style-type: none"> • Engagement has been taking place with key public sector partners throughout 2018-19. Following recent discussions with partners on preventing the participation of organised crime in public procurement, NHS National Procurement agreed to use Scotland Excel's demolition framework instead of developing their own.
	<ul style="list-style-type: none"> • Continue to inform and support national procurement policy in consultation with the local government procurement community 		<ul style="list-style-type: none"> • Scotland Excel presented on the potential impact of Brexit on food procurement at a COSLA event in January 2019, and provided input for a Scottish Government's Economy, Energy and Fair Work Committee meeting reviewing amendments to public procurement regulations following the UK withdrawal from the EU.
<p>1.2 Deliver programmes which lead and develop professional, organisational and commercial capability</p>	<ul style="list-style-type: none"> • Develop and deliver a targeted programme of change projects based on development needs identified by Procurement & Commercial Improvement Programme (PCIP) assessments 		<ul style="list-style-type: none"> • Three of the six change projects targeted for 2018-19 have been completed. A further two projects in are progress and will be completed in 2019-20. The sixth project is in the early planning stage following confirmation of stakeholder requirements. Scotland Excel is reviewing sector-wide change project opportunities for 2019-20 with the Procurement Improvement Programme (PIP) steering group, which will be based on the outputs of the current cycle of PCIP assessments.

	<ul style="list-style-type: none"> • Deliver a second cycle of local government PCIP assessments for all local authorities 		<ul style="list-style-type: none"> • PCIP assessments had been completed with 25 councils by the end of March 2019. Assessments will be completed with all councils by September 2019.
	<ul style="list-style-type: none"> • Deliver the chargeable consultancy projects and transformation programmes agreed for Aberdeen City and Fife Councils, and respond to any further requests for these types of services from other councils 		<ul style="list-style-type: none"> • Scotland Excel's consultancy programme for Aberdeen City Council has now concluded and outputs have been received positively by the council. The transformation programme for Fife Council continues to progress well and has met its target for a savings pipeline which is now being delivered. The second phase of the project for East Renfrewshire Council has been completed and a third phase will begin in early 2019-20. The Tayside consultancy programme has been initiated and recruitment of a project team is underway.
	<ul style="list-style-type: none"> • Continue to develop and deliver accredited work-based learning programmes through the Scotland Excel Academy 		<ul style="list-style-type: none"> • During 2018-19, six courses were completed and a further six were in progress across the three key disciplines of procurement, leadership and management, and project management. A total of 107 learners took part in courses this year, of which 10 have achieved qualifications. Following its success at the GO Scotland Awards in October 2018, the Academy has been shortlisted for the National GO Awards which take place in April 2019. Preparations are underway to establish 11 new cohorts in 2019-20, including new programmes for strategic leadership, coaching and mentoring, and business analysis and innovation.
	<ul style="list-style-type: none"> • Develop and deliver a programme of practitioner workshops, masterclasses and events to lead best practice through the Scotland Excel Academy 		<ul style="list-style-type: none"> • Three practitioner workshops and one masterclass took place in 2018-19. This is slightly lower than anticipated, and a new approach is being developed for 2019-20 which encompasses c. 20 practice workshops based on content from the Academy's accredited programmes.

	<ul style="list-style-type: none"> Continue to develop Scotland Excel Academy online resources to support learning programmes and create a community platform for sharing best practice 		<ul style="list-style-type: none"> Academy online resources are continually evolving as new programmes and cohorts are introduced. Content from events and practitioner workshops is shared with the wider procurement community.
1.3 Harness the potential of digital technology and data insight to support the delivery of public services	<ul style="list-style-type: none"> Continue to provide ICT procurement services for the Digital Office for Scottish Local Government, engaging proactively with stakeholders to promote a collaborative approach to the adoption of digital technologies 		<ul style="list-style-type: none"> Scotland Excel has continued to provide support for the Digital Office throughout 2018-19. As collaborative procurement opportunities have been limited, an information sharing tool providing Scotland-wide visibility of software contract information has been implemented to identify future opportunities. The strategy and specifications for a replacement social work care case management system have been agreed and the tender will be released in early 2019-20. A strategy meeting with the Digital Office took place in March 2019 to agree activity for the next two years.
	<ul style="list-style-type: none"> Continue to develop data analytic tools and resources to support the expansion of the contract portfolio and provide management information to the sector 		<ul style="list-style-type: none"> Scotland Excel is continuing to develop resources and tools for analysing contract spend data using an agile model in which software requirements are developed incrementally and each phase is tested before building further functionality.
	<ul style="list-style-type: none"> Continue to develop and share access to the Cost of Care calculator to support the delivery of affordable and sustainable social care services 		<ul style="list-style-type: none"> Scotland Excel has now taken over operational management of the National Care Home Contract (NCHC) from COSLA and will be leading the next stage of negotiations to conclude the cost of care calculator, now officially named the NCHC Cost Model ©. This is expected to be concluded by September 2019 to enable the model to be in place for fee setting in 2020-21.
	<ul style="list-style-type: none"> Continue to develop and share access to Indexation Modelling to track market influences on costs 		<ul style="list-style-type: none"> Indexation Modelling continues to form part of contract management activities. Following successful indexation events held for the sector, in-house workshops have been delivered for Fife Council and Glasgow City Council procurement teams. Similar workshops are being planned for Angus, Dundee and Perth & Kinross councils as part of the Tayside consultancy programme.

	<ul style="list-style-type: none"> • Deliver market analysis reports in support of new collaborative procurement or service opportunities 		<ul style="list-style-type: none"> • IBIS World and Company Watch are now established as market intelligence resources across Scotland Excel's procurement teams, and access has been renewed for 2019-20.
	<ul style="list-style-type: none"> • Develop plans to roll out data analytic tools to staff across the organisation 		<ul style="list-style-type: none"> • Power BI data analytics tools will be rolled out to staff during 2019-20 once the first development phase has been completed.
1.4 Use our insight and experience to shape policy and meet the challenges of future public service delivery	<ul style="list-style-type: none"> • Continue to work with the Scottish Government, COSLA and other partners to support the development and/or delivery of national policy in social care 		<ul style="list-style-type: none"> • Scotland Excel is continuing to engage with the Scottish Government, COSLA, Health & Social Care Partnerships and care providers on the NCHC Cost Model © and new frameworks for care and support and older people's care homes.
	<ul style="list-style-type: none"> • Continue to work with the Scottish Government and other partners to support the development and/or delivery of education policies such as early learning provision, pupil attainment funding, and food procurement for school meals 		<ul style="list-style-type: none"> • Scotland Excel is completing a strategic review of food procurement in response to policy and legislative changes for school meals, including the possible expansion of free meal entitlement within schools and nurseries. Scotland Excel is also working with the Scottish Government to assess the risks and impact of Brexit on food procurement.
	<ul style="list-style-type: none"> • Continue to work with the Scottish Government, Association of Local Authority Chief Housing Officers (ALACHO) and other partners to support the development and/or delivery of national policy in affordable housing 		<ul style="list-style-type: none"> • Scotland Excel will focus on the development of the new build housing framework in 2018-19 and will explore further opportunities to influence or support affordable housing policy in 2019-20.
	<ul style="list-style-type: none"> • Continue to work with the Scottish Government, Zero Waste Scotland and other partners to support the development and/or delivery of national environmental policy 		<ul style="list-style-type: none"> • Scotland Excel continues to work with Zero Waste Scotland on environmental matters across the procurement portfolio. The support of Zero Waste Scotland and other partners has been particularly valuable for developing a dynamic purchasing system for recyclable and residual waste. Zero Waste Scotland have been invited to speak At Scotland Excel's annual conference in April 2019.

	<ul style="list-style-type: none"> • Develop and deliver a calendar of communications activities which promotes our knowledge and experience in support of our policy and public affairs goals 		<ul style="list-style-type: none"> • Scotland Excel held a successful event at the Scottish Parliament for MSPs and senior stakeholders in January 2019. This was the final initiative of the '10 Years' anniversary campaign which raised awareness of Scotland Excel through publications, social media and events. In February 2019, Scotland Excel was a key partner in the successful Delivering on Digital event to promote digital transformation in local government.
	<ul style="list-style-type: none"> • Continue play a lead role in the development and delivery of national Graduate Apprenticeships as a cost-effective talent management opportunity for the local government sector 		<ul style="list-style-type: none"> • Scotland Excel is continuing to engage with public sector and academic partners to position the Academy as a potential Graduate Apprenticeship assessment partner.

Goal 2: Being sustainable in everything we do

Strategic Objective	Commitment	RAG status	Progress summary
2.1 Deliver positive and measurable social value through our contracts and services	<ul style="list-style-type: none"> Develop plans to increase the proportion of Scotland Excel suppliers paying their staff the Scottish Living Wage 		<ul style="list-style-type: none"> An analysis undertaken in 2018-19 indicated that around 80% of Scotland Excel suppliers are paying the Scottish Living Wage which limits the scope for further increases. This will be examined again in 2019-20 once the new CSM programme is in place across the contract portfolio.
	<ul style="list-style-type: none"> Continue to develop community benefit models which enable councils to achieve direct benefits for their areas 		<ul style="list-style-type: none"> A revised evaluation model for community benefits is now being embedded in all tenders to ensure that benefits are delivered to each council using the framework,
	<ul style="list-style-type: none"> Continue to support opportunities for disabled/ disadvantaged workers through community benefits and/or the participation of supported businesses and the third sector within our supply chain 		<ul style="list-style-type: none"> The supported business, Scottish Bravest Manufacturer, which services Scotland Excel's road signage framework, has reported c. £1m of business from participation in national frameworks. Work to develop a strategy for engaging with supported businesses will be developed in 2019-20.
2.2 Deliver positive and measurable local economic impact through SME and third sector participation in our contracts	<ul style="list-style-type: none"> Continue to work with the Supplier Development Programme (SDP) to raise awareness of public procurement opportunities and encourage participation among Scottish SMEs 		<ul style="list-style-type: none"> In Q4, Scotland Excel attended SDP Meet the Buyer events in Kirkintilloch and Dundee. Over the course of 2018-19, Scotland Excel delivered 7 SDP training seminars for SMEs and attended 5 events.
	<ul style="list-style-type: none"> Increase direct and supply chain opportunities for Scottish SMEs and contractors within Scotland Excel contracts, particularly within the construction portfolio 		<ul style="list-style-type: none"> Opportunities to encourage participation by Scottish SMEs continue to be considered in strategy development for all contracts.
	<ul style="list-style-type: none"> Encourage housing associations to consider the local economic impact they can deliver through the use of Scotland Excel contracts 		<ul style="list-style-type: none"> Consideration of local economic impact forms a key part of the PCIP assessment undertaken with housing associations. Scotland Excel and the Scottish Federation of Housing Associations (SFHA) have co-produced a publication showcasing good practice in community benefits.

2.3 Deliver positive and measurable environmental benefits through our contracts	<ul style="list-style-type: none"> Continue to encourage suppliers to Scotland Excel contracts to consider opportunities to increase recycling of their products and packaging and/or reduce their carbon footprint 		<ul style="list-style-type: none"> Scotland Excel's tender documentation continues to include appropriate environmental considerations including, where appropriate, the weighting and scoring of emissions.
	<ul style="list-style-type: none"> Develop and implement a model for considering 'whole life' costing within tender evaluations, including plans for monitoring costs over the lifecycle of products and services 		<ul style="list-style-type: none"> Scotland Excel's tender documentation continues to include appropriate cost evaluation to ensure that lifetime value is assessed.
	<ul style="list-style-type: none"> Continue to support the collection, handling, treatment and recovery of value from waste by implementing new recyclable and residual waste arrangements which offer increased options for recycling and/or disposal and cover additional types of waste 		<ul style="list-style-type: none"> A dynamic purchasing system (DPS) for recyclable and residual waste was approved in February 2019 and includes 53 suppliers. This approach will allow councils full flexibility over their requirements for waste handling and will allow new entrants to the marketplace on an annual basis.
	<ul style="list-style-type: none"> Develop plans for assessing and mitigating the environmental impact of Scotland Excel's activities 		<ul style="list-style-type: none"> Scotland Excel has now appointed a new Corporate Services Manager who took up his post in March 2019. Plans for assessing and mitigating the organisation's environmental impact will form part of his activities in 2018-19.
2.4 Lead and develop sustainable procurement knowledge and practice	<ul style="list-style-type: none"> Produce an annual report on procurement activity in line with the requirements of the Procurement Reform (Scotland) Act 2014, providing support and guidance on reporting commitments to the local authorities 		<ul style="list-style-type: none"> An Annual Procurement Report for 2017-18 has been published in line with the requirements of the Procurement Reform (Scotland) Act 2014.
	<ul style="list-style-type: none"> Continue to work with national partners on the development of sustainable procurement guidance and tools 		<ul style="list-style-type: none"> Scotland Excel has continued to engage with national partners through the Scottish Government's Best Practice Working Group throughout 2018-19. A workplans for 2019 has been agreed and will include sustainable procurement guidance for the Procurement Journey.

	<ul style="list-style-type: none"> • Develop plans to increase the local government sector's sustainable procurement knowledge and capability through the Scotland Excel Academy 		<ul style="list-style-type: none"> • Sustainable procurement is embedded in the CIPS accredited course delivered through the Scotland Excel Academy, and will form part of a non-accredited 'introduction to procurement' course which will be available in 2019-20.
	<ul style="list-style-type: none"> • Develop and implement plans to promote sustainable procurement to elected members and senior officers to support a 'whole organisation' approach 		<ul style="list-style-type: none"> • Plans to promote sustainable procurement to elected members and senior officers will form part of senior stakeholder engagement plans which will be developed in 2019-20.

Goal 3: Placing people at the heart of our business

Strategic Objective	Commitment	RAG status	Progress summary
3.1 Ensure our customers continue to receive maximum value from our services	<ul style="list-style-type: none"> Continue to develop Scotland Excel's account management services to ensure they deliver value to local authority procurement teams and support a positive customer experience for councils 		<ul style="list-style-type: none"> Scotland Excel's account managers are delivering a range of initiatives including change projects, PCIP assessments and practitioner workshops in addition to their quarterly business reviews. The team is also supporting the development of online management information tools for councils.
	<ul style="list-style-type: none"> Explore further opportunities to use digital technologies to engage with customers and/or expand online 'self-service' facilities, incorporating the findings into Scotland Excel's ICT strategy and roadmap 		<ul style="list-style-type: none"> Following the successful implementation of self-service reports for social care information, Scotland Excel has been working on the delivery of self-service contract spend reports. User acceptance testing (UAT) will take place in early 2019-20 before rolling out to all relevant stakeholders.
	<ul style="list-style-type: none"> Explore the feasibility of providing additional services requested by customers, incorporating the findings into future operational plans 		<ul style="list-style-type: none"> In 2018-19, Scotland Excel has focused on expanding the range of courses available through the Academy, extending the portfolio of small value contracts, developing a new build housing framework and delivering consultancy services to councils. An innovation model is being developed to support the identification of further new service opportunities in 2019-20.
	<ul style="list-style-type: none"> Embed the outputs of Scotland Excel's stakeholder engagement project into customer and stakeholder engagement plans and activities, ensuring that these reflect the organisation's expanding customer base 		<ul style="list-style-type: none"> Work to expand and refresh customer and stakeholder engagement plans which was due to take place in Q4 has now been scheduled for the first quarter of 2019-20.
3.2 Engage stakeholders in the delivery of effective local solutions	<ul style="list-style-type: none"> Develop a model for incorporating community engagement, where appropriate, into the development of procurement strategies 		<ul style="list-style-type: none"> Opportunities for stakeholder participation, including wider community engagement, are now reviewed as part of the governance process for procurement strategies. Scotland Excel has also contacted the Scottish Government to offer any support that may be required for the Review of Local Governance.

	<ul style="list-style-type: none"> • Continue to engage directly with service users, where appropriate, to ensure their needs are considered within service design 		<ul style="list-style-type: none"> • Scotland Excel has continued to consider the involvement of service users, where appropriate, in contract development throughout 2018-19. Although opportunities have been limited this year, service users will once again be involved in the evaluation of meals for the upcoming community meals framework renewal in 2019-20.
	<ul style="list-style-type: none"> • Explore the feasibility of working with educational partners and/or suppliers to promote the benefits of procurement to pupils, incorporating the findings into future operational plans 		<ul style="list-style-type: none"> • Scotland Excel is continuing to work with educational charity, Founders4Schools. In 2018-19, Scotland Excel staff attended seven school careers events through the charity and direct contact. An initiative is being explored which would provide an annual forum for head teachers to learn about educational frameworks and community benefits which may benefit their pupils.
<p>3.3 Represent the collective views of stakeholders at a national level</p>	<ul style="list-style-type: none"> • Review Scotland Excel's representation activities to ensure that these are targeted where they can have the greatest impact 		<ul style="list-style-type: none"> • A review of national engagement activity will take place to ensure that resources are targeted effectively for the benefit of stakeholders. Originally scheduled for completion by December 2018, this will now take place in early 2019-20.
	<ul style="list-style-type: none"> • Establish a model for undertaking representation activities, including a clear feedback loop for customers and/or communities 		<ul style="list-style-type: none"> • The model will be developed on completion of the review of national engagement activity. Outputs will be discussed with key stakeholders including the Scottish Local Government Procurement Forum (SLGPF) to ensure that national engagement activities undertaken by Scotland Excel incorporate local views.
	<ul style="list-style-type: none"> • Build on relationships with the Convention of Scottish Local Authorities (COSLA) and/or elected members to represent customers and communities in appropriate policy and political matters 		<ul style="list-style-type: none"> • Scotland Excel has continued to engage with COSLA throughout 2018-19. Recent engagement has focused on the handover of the National Care Homes Contract (NCHC) which Scotland Excel will manage from April 2019. Further discussions are required on profit levels within the care cost model which underpins fee negotiations for this contract.

3.4 Implement policies which develop, empower, value and engage our workforce	<ul style="list-style-type: none"> Continue to deliver Scotland Excel's organisational development strategy and rolling improvement plans, involving staff in the development of plans, policies and initiatives where appropriate 		<ul style="list-style-type: none"> Implementation of the organisational development (OD) strategy has continued throughout 2018-19. New approaches to recruitment and performance review and development (PRD) have been developed in response to staff feedback. Scotland Excel's Investors in People (IiP) assessment was completed in March 2019 and indications are that the organisation will achieve Silver accreditation. The findings from the IiP assessment will be explored with staff at a development day in June 2019, and will inform a refresh of the OD strategy in 2019-20.
	<ul style="list-style-type: none"> Develop and implement a talent management programme to inspire and develop staff, increase Scotland Excel's capability, and support succession planning 		<ul style="list-style-type: none"> Following feedback from staff, plans for developing a talent management programme have been put on hold. In the meantime, staff are being encouraged to participate in Scotland Excel Academy programmes relevant to their role and aspirations.
	<ul style="list-style-type: none"> Develop plans for agile working to create a productive working environment that benefits staff, Scotland Excel, and customers 		<ul style="list-style-type: none"> Technology solutions which support agile working are now in place and the number of hot desks available in the office has been increased. A review of telephony arrangements has been completed and a new solution will be implemented in May 2019. A policy to support agile working has been put in place for staff.

Goal 4: Delivering sustainable and scalable growth

Strategic Objective	Commitment	RAG status	Progress summary
4.1 Implement a new governance model which supports scalable business growth	<ul style="list-style-type: none"> Complete the review of Scotland Excel's governance and funding models, presenting recommendations to the Joint Committee for approval 		<ul style="list-style-type: none"> Scotland Excel will continue to operate its existing governance model in support of the 2018-23 strategy. Governance arrangements will continue be reviewed periodically to ensure they align with the organisation's ambitions.
	<ul style="list-style-type: none"> Develop plans to implement the governance recommendations approved by the Joint Committee 		<ul style="list-style-type: none"> Governance and funding proposals to support the delivery of the 2018-23 strategy were approved by the Joint Committee in June 2018.
	<ul style="list-style-type: none"> Implement appropriate funding models to support the delivery of new and existing services 		<ul style="list-style-type: none"> Income is being accrued through Academy, consultancy and associate member revenue. All new or renewed contracts in development are being assessed for rebate potential. Income from the new build housing framework is expected to be begin in Q4 of 2019-20. An income review board has being established to monitor revenue generation against targets, and reports on funding will be submitted to the Joint Committee.
4.2 Continue to maintain a robust business infrastructure to support our growth ambitions	<ul style="list-style-type: none"> Review Scotland Excel's business infrastructure to ensure it can support the organisation's growth ambitions, developing plans for continuous improvement initiatives and to address any gaps in capacity and/or capability 		<ul style="list-style-type: none"> Scotland Excel has strategies and plans in place for the continuous development of key business areas including ICT and OD. Additional space has been secured in Renfrewshire House from April 2019 to accommodate growing staff numbers.
	<ul style="list-style-type: none"> Develop a risk model for evaluating new business opportunities to assess their impact on internal resources and/or existing customers 		<ul style="list-style-type: none"> A new business evaluation model will be developed during 2019-20, and some exploratory work has been initiated to determine the organisation's risk appetite. In the meantime, Scotland Excel has refined its new business pitching process to ensure that a sufficient level of commitment is secured before detailed proposals are developed.

	<ul style="list-style-type: none"> Continue to implement technology solutions which increase efficiency, support agile working and offer scalability for business growth 		<ul style="list-style-type: none"> The key focus of the ICT strategy in 2018-19 was to create a robust ICT infrastructure, including migration to a cloud server and virtualisation of key applications to support agile working and data retention. This has created solid foundations for further ICT development in 2019-20.
4.3 Use our knowledge and insight to identify new services and/or sectors which provide growth opportunities	<ul style="list-style-type: none"> Review collaborative procurement and leading change solutions available in other public sector markets to identify potential business opportunities, reporting on the findings to inform future operational plans 		<ul style="list-style-type: none"> Scotland Excel has been undertaking competitive analysis as part of market opportunity reports for income-generating services. A comprehensive competitive review across all aspects of the organisation will be undertaken in 2019-20.
	<ul style="list-style-type: none"> Continue to deliver procurement support to housing associations on behalf of the Scottish Government and develop plans to market additional Scotland Excel services which secure the long term sustainability of this service 		<ul style="list-style-type: none"> Scotland Excel completed 13 PCIP assessments with housing associations on behalf of the Scottish Government during Q4. Overall, engagement took place with 96 housing associations during the two-year programme, and 53 assessments were completed which covers one third of the sector and 62% of all housing stock. A further 19 housing associations completed a pre-assessment which provided them with a better understanding of public procurement. Scotland Excel will continue to offer support during 2019-20.
	<ul style="list-style-type: none"> Continue to develop and market Scotland Excel's associate membership programme to maximise its commercial potential for the organisation and the benefits it provides to members 		<ul style="list-style-type: none"> Seven new associate members were recruited during 2018-19, generating an additional £18,260 in revenue from membership fees. A market opportunity report has been completed for the social housing sector and will inform plans for increasing associate membership within this and other sectors during 2019-20. Chargeable consultancy projects are being delivered for associate members, City Property and Cycling Scotland.

	<ul style="list-style-type: none"> Continue to market Scotland Excel through traditional and social media, targeted communications activity and political engagement to support new business opportunities 		<ul style="list-style-type: none"> In 2018-19, marketing and communications campaigns were delivered to attract housing associations as associate members, promote participation in the new build housing tender to contractors, and raise awareness of Scotland Excel Academy programmes. Market opportunity reports are being produced to inform strategic marketing activities for income-generating products and services in 2019-20.
	<ul style="list-style-type: none"> Identify opportunities arising for staff development through new business opportunities, fostering an understanding of commercial and entrepreneurial approaches across the organisation 		<ul style="list-style-type: none"> A number of staff are working on external consultancy projects as full-time team members while others are providing support for projects in specific areas. Senior Management Team members are now taking part in business development meetings with senior stakeholders.
4.4 Explore opportunities to work with partners on the development and delivery of new business opportunities	<ul style="list-style-type: none"> Explore opportunities to work in partnership with other public sector bodies to increase internal efficiency and/or improve service delivery for customers, reporting on the findings to inform future operational plans 		<ul style="list-style-type: none"> Following the successful launch of a Professional Development Award (PDA) in project management, developed and delivered in partnership with the Improvement Service, a PDA in business analysis and innovation is now in development.
	<ul style="list-style-type: none"> Continue to manage Scotland Excel's partnership with Crown Commercial Services (CCS) to ensure it is delivering against customer expectations, and explore opportunities to extend this partnership 		<ul style="list-style-type: none"> The CCS framework for vehicle purchases awarded in 2018-19 continues to work well. Scotland Excel has had significant input into the strategy for a new CCS vehicle leasing framework to ensure that it meets the needs of councils. This new framework goes live in the summer of 2019.
	<ul style="list-style-type: none"> Design a model for providing procurement support to SEEMiS in line with the partnership agreement 		<ul style="list-style-type: none"> Scotland Excel has agreed with SEEMiS to provide procurement support for a range of projects until the end of March 2020. Priorities include a Management Information System (MIS) for early learning and childcare services, school text messaging and the second phase of the Next Generation MIS for schools.

Report Key

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

Key Performance Indicators

Outcomes	Key Performance Indicators	Year End Status
Our services shape the effective and efficient delivery of public services	<ul style="list-style-type: none"> • Number of contracts delivered v plan¹ • Value of contract portfolio v target 	<ul style="list-style-type: none"> • 31 contracts delivered v 31 targeted • £1.02bn value v £1.4bn target
Our expertise leads continuous improvement in commercial performance	<ul style="list-style-type: none"> • Number of PCIP assessments delivered v plan • Number of Scotland Excel Academy courses v plan² 	<ul style="list-style-type: none"> • 25 assessments delivered v 22 targeted • 49 courses delivered v 40 targeted
Our services facilitate the delivery of national and local policy priorities	<ul style="list-style-type: none"> • Tonnes of waste diverted from landfill through Scotland Excel contracts • Number of Scottish suppliers & percentage SMEs 	<ul style="list-style-type: none"> • 44,092 tonnes (Oct to Dec 2018) • 524 Scottish suppliers of which 75.8% are SMEs
Our services enable positive and sustainable outcomes for people and communities	<ul style="list-style-type: none"> • Number of community benefits realised to date 	<ul style="list-style-type: none"> • 629 jobs • 254 apprenticeships • 165 work placements • 61,313 hours work experience • 5761 hours volunteering/mentoring • £902k value of other initiatives
Our insight and knowledge underpin innovative solutions for our customers	<ul style="list-style-type: none"> • Number of business change initiatives delivered v plan 	<ul style="list-style-type: none"> • X initiatives delivered v 6 targeted
Our activities are recognised as leading the way in public procurement	<ul style="list-style-type: none"> • Media coverage v target • Number of speaking engagements v target 	<ul style="list-style-type: none"> • 68 media items published v 60 targeted • 17 speaking engagements v 12 targeted
Our customers receive a measurable return on investment through savings	<ul style="list-style-type: none"> • Percentage savings achieved across the portfolio v target³ • Savings achieved in the last quarter 	<ul style="list-style-type: none"> • 4.2% savings v 2.5% target • £2.9m (Oct to Dec 2018)
Our customers are satisfied with our services and how we deliver them	<ul style="list-style-type: none"> • Customer satisfaction scores v target⁴ 	<ul style="list-style-type: none"> • 80% of respondents

Report issued: May 20

¹ Contracts developed, renewed or extended

² Programmes, workshops and masterclasses

³ Average savings during the strategy period (2018-23) excluding social care contracts

⁴ Percentage of respondents reporting 'good' or 'very good' overall satisfaction in the most recent customer satisfaction survey (currently 2017)

Appendix 4
Planned Procurement to 31/03/2021

Frameworks due for renewal (or subject to contract extension) by 31 Mar 2021

Contract Title	Schedule Number	End Date of current framework
Presentation & Audio Visual Equipment	1214	31/03/2019
Asbestos	1114	31/03/2019
Building And Timber Materials	1314	31/03/2019
Security (Services)	0814	31/03/2019
Security (Equipment)	0814b	31/03/2019
Energy Efficiency Contractors	0913	30/04/2019
Community Meals	0115	31/08/2019
Care Homes for Adults (LD)	0511	15/09/2019
Buildings Related Engineering Consultancy	1113	30/09/2019
Steeplejack Services	1017	31/10/2019
Bottled Gas	0817	05/11/2019
Laundry Equipment	0917	05/11/2019
Plumbing and Heating Materials	1714	30/11/2019
Pest Control Services	1217	30/11/2019
Technology Enabled Care	3117	31/12/2019
Water Coolers	1317	07/01/2020
Catering Machines	2117	07/01/2020
Swimming Pool Chemicals	1517	07/01/2020
Digital Publications and Services	2517	31/01/2020
Education And Office Furniture	0216	29/02/2020
Outdoor Play Equipment and Artificial Surfaces	0215	12/03/2020
Electrical Materials	0615	31/03/2020
Secure Care	0716	31/03/2020
Waste Disposal Equipment	0315	31/03/2020
Organic Waste	0816	31/03/2020
Fire Safety Products	1617	15/04/2020
Groceries & Provisions	0515	30/04/2020
Customer Service Platform	0415	31/05/2020
Street Lighting Bulk Renewal of Luminaires	1013	30/06/2020
Demolition	1115	31/07/2020
Catering Sundries	0915	31/07/2020
Boiler Maintenance	2217	13/09/2020

Domestic Furniture and Furnishings	0815	31/10/2020
Recycle And Refuse Containers	0117	02/11/2020
Vehicle Parts	0116	31/12/2020
Trade Materials	0717	16/02/2021
Power Tools	0218	16/02/2021
Personal Protective Equipment	0416	28/02/2021
Bitumen Products	0516	28/02/2021
Milk	1917	28/02/2021
Engineering Consultancy	0616	17/03/2021
Fostering	1015	24/03/2021
Frozen Foods	1016	30/06/2021

New Contract Areas

Contract Title	Forecast Delivery date
Social Care Case Management Solutions	Oct 19
Care Home Services for Older People	Apr 19
Care and Support	Jan 20
Alcoholic Beverages (OSS)	Aug19
Bikeability Scotland Training Providers (OSS)	Aug 19
New Build Residential	Sep19
Swimming Pool Contractors (OSS)	Oct 19
Bread and Rolls (OSS)	Oct 19
Legionella And Water Control Services	Dec 19
Sheriff Officers	Dec 19
Fresh Fruit & Veg (OSS)	Apr 20
Building Related Professional Services	Jun 20