

To: Joint Committee

On: 29 June 2018

**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 of 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. The first annual procurement report to be published will be based on the 2017-2018 financial year (for Scotland Excel this is 1 April 2017 – 31 March 2018) and should also include the period from 1 January 2017 to the start of the financial year.

2 Annual Report on Procurement in Scotland

After the end of each financial year, Scottish Ministers must prepare a report based on the information contained in the published annual reports from public organisations. This is called the Annual Report on Procurement in Scotland.

The Annual Report on Procurement in Scotland by Scottish Ministers will be based on information contained within individual annual procurement reports and such other information that is considered appropriate.

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) 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 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 (1st Jan 2017 – 31st March 2018)

June 2018

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Scotland Excel Annual Procurement Report 2018

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 £1 billion contract portfolio supports the delivery of social care, construction, roads, transport, environment, corporate, education and ICT services, and achieves annual savings of c. £15m. 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 requires any public organisation who is required to publish a procurement strategy to prepare an annual procurement report.

This annual procurement report will review the Procurement Strategy published by Scotland Excel in December 2016 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 fifty-six live framework agreements. These frameworks are aligned to Councils' requirements and are established on their behalf. Appendix 1 provides a high-level summary of the regulated procurements Scotland Excel has completed between 1st Jan 2017 and 31st March 2018. 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

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) below:

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 have recently reviewed the commodity strategy template to incorporate recent legislative updates with a particular focus on data protection by design in light of the recent introduction of the General Data Protection Regulation (“GDPR”) and the

new Data protection Act 2018. 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 2017/18 is given at Appendix 2

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. Those who receive spend, in excess, of £10,000 are required to produce a detailed breakdown of the community benefits they provide. The information for the last financial year has been collated and is given in the table below:

Table 1 – Community Benefits 2017/18

Classification of Community Benefit	2017/18
No. of Apprentices	52
No. of New Jobs	146
No. of Work Placements	29
Hours of Volunteering	1637

Hours of Work Experience	2541
Value of other Community Benefits	£311,754

This return is vital for the reporting of social and environmental benefits provided as a result of 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 we have noted progressive results. A number of suppliers are now creating designated ‘community benefit funds’ based on the spend they receive for contracting authorities to invest appropriately in community related projects. This detailed approach by suppliers evidences fulfilment of community benefits and a dedicated approach to providing social and environmental benefits.

Additionally, Community Benefits are reviewed with suppliers at contract management review meetings and reported to local authority procurement managers at their business review meetings.

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.

Although no Regulated contracts were reserved for supported businesses in 2017/18 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. By way of an example Scotland Excel have received wide spread recognition for their Domestic Furnishings and Furniture framework which was awarded for the inclusion of supported businesses. This framework was testament to innovative procurement that facilitated the inclusion of supported businesses. In a similar way the ability to include supported

businesses has been identified in a number of other frameworks. Scotland Excel will aim to take advantage of these opportunities and continue in our engagements to increase business placed with supported businesses. Supported business related initiatives are monitored as a Key Performance Indicator (KPI) during ongoing contract management.

In order to further support and promote supported businesses Scotland Excel hosted an event to bring together representatives from supported businesses and council procurement and economic development teams to identify opportunities for joint working.

Delegates heard from several speakers including Paul Wheelhouse, Minister for Business, Innovation and Energy, and took the opportunity to network and exchange ideas.

Scotland Excel took the opportunity to again emphasise that supported businesses 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.

Furthermore, we highlighted how we are always looking for appropriate ways to include supported businesses in our frameworks – as demonstrated by the supply chain opportunities incorporated into our award-winning Domestic Furniture and Furnishings framework.

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 thirty regulated procurements over the next two financial years however these are subject to change. Details of these anticipated contract requirements are shown in Appendix 3

Scotland Excel is presently reviewing dynamic purchasing systems to determine if these are appropriate in any future regulated procurement exercises.

Section 6 – Other Content for consideration

At Scotland Excel, we are leaders of change. Over the past ten 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 £8.75 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) Jan 2017 - Mar 2018

Award Date	Short Contract Title	Total Contract Value	Start Date	End Date	Supplier Name	Schedule No
13/12/2016	Demolition	£64,000,000.00	04/01/2017	31/07/2018	Bardem Limited	1115
					Brown And Mason Limited	1115
					Burnfield Builders & Demolishers Ltd	1115
					C. E. P. Demolitions Limited	1115
					Caskie Limited	1115
					Central Demolition Limited	1115
					Cmec Demolition Ltd	1115
					Connell Brothers Ltd	1115
					Daltons Demolition Limited	1115
					Damada Asbestos Removals Ltd T/a Damada Group	1115
					David Morton (labert) Limited	1115
					Erith Contractors Limited	1115
					Frank O' Gara & Sons Limited	1115
					George Beattie & Sons Limited	1115
					Jcj (demolition & Construction) Limited	1115
					John Graham (metals) Limited	1115
					Kdc Contractors Limited	1115
					Keltbray Limited	1115
					Lawrie (demolition) Ltd	1115
					Macwilliam Demolition Limited	1115
Reigart Contracts Limited	1115					
Safedem Limited	1115					
William Goodfellow (contractors) Limited	1115					
William Munro Construction (highland) Ltd	1115					
16/01/2017	Vehicle Parts	£48,000,000.00	13/01/2017	31/12/2020	A M Phillip Trucktech Ltd	0116
					A.j. Grant & Sons	0116
					Aebi Schmidt Uk Ltd	0116
					Allglass Automotive And Plant Glazing Ltd	0116

Arnold Clark Automobiles Ltd (T/A Arnold Clark)	0116
Bramall Quicks Dealerships T/a Quickco	0116
Brush Technology Ltd	0116
Cartwright Fleet Services (glasgow) Ltd	0116
Clark Commercials	0116
DAF Truck Ltd (Norscot Truck and Van Ltd)	0116
Dennis Eagle Ltd	0116
Dingbro Ltd.	0116
Farid Hillend Engineering Limited	0116
Faun Zoeller Uk Limited	0116
Fleet Factors Ltd	0116
Flying Penguin Enterprises Ltd (T/A Flying Penguin Autoparts)	0116
Frank Nicol Farm & Garden Machinery Ltd	0116
Highland Windscreen Services	0116
Hydraulink Ltd	0116
Kerr & Smith (Glasgow) Ltd	0116
MacRae & Dick Ltd	0116
Masterparts (Bellshill) Ltd	0116
Mckinnon & Forbes Ltd	0116
Mgm Hoses Ltd T/a Pirtek Paisley	0116
Nets Parts/ N E Truck Spares Ltd	0116
Northern Municipal Services Ltd	0116
Plant Glazing Ltd	0116
Prime Industrial & Janitorial Supplies Ltd	0116
Scarab Sweepers Ltd	0116
Sonitex T/a Premier Windscreens	0116
Stanley R Harris Ltd	0116
Taylor Engineering And Fabrications Ltd	0116
The Trade Parts Specialist/ Volkswagen Group United Kingdom Ltd	0116
Windscreens Scotland Ltd T/a National Windscreens	0116

03/03/2017	Bitumen Products	£48,000,000.00	01/03/2017	28/02/2019	Colas Ltd	0516
					Instarmac Group Plc	0516
					Jobling Purser	0516
					Nynas UK AB	0516
					Viatec Uk Ltd	0516
09/05/2017	Education And Office Furniture	£36,000,000.00	01/03/2017	29/02/2020	Apleona Hsg Limited	0216
					Atlas Business Interiors Ltd	0216
					Azzurro Ltd	0216
					British Thornton ESF Ltd	0216
					City Building Contracts LLP (RSBi)	0216
					Claremont Office Furniture Ltd	0216
					Educational & Municipal Equipment Ltd (T/A EME Furniture)	0216
					Equip4work Ltd T/a Office Furniture Online	0216
					Findel Educational Supplies Limited	0216
					Furniture @work Ltd	0216
					Godfrey-syrett Limited	0216
					Gopak Ltd	0216
					Gts Central Ltd	0216
					Langstane Press Limited	0216
					Sharp Business Systems Uk Plc	0216
					Sico Europe Ltd	0216
					Spaceright Europe Ltd	0216
					The Consortium for Purchasing and Distribution Ltd (T/A The Consortium)	0216
					Wagstaff Bros Ltd (T/A Wagstaff Interiors Group)	0216
					Wagstaff School Furniture	0216
					Yorkshire Purchasing Organisation	0216
23/05/2017	Personal Protective Equipment	£40,000,000.00	01/03/2017	28/02/2019	Allison & Stiven Ltd	0416
					Arco Ltd	0416
					Bunzl UK Ltd (T/A Greenham)	0416
					Cleaning and Wiping Supplies Ltd.	0416

					Corston Sinclair Limited	0416
					D. Gibson Road & Quarry Services Ltd	0416
					Donside Group Llp	0416
					Gts Central Ltd	0416
					Ioma Clothing Company Ltd	0416
					James Boylan Safety NI Ltd (T/A JBS Group)	0416
					Lion Safety	0416
					Mo & Co (uk) Ltd	0416
					Morna Laird Ltd (t/a Mckinlay Workwear Supplies)	0416
					Mwuk Ltd (t/a Alexandra)	0416
					Protective Wear Supplies Ltd	0416
					Rexel Uk Limited	0416
					Scott Direct Limited	0416
					Stax Trade Centres Plc	0416
					The Guthrie Group Ltd	0416
					Unico Limited	0416
					Wc Willis & Co Ltd (t/a Willis Safety)	0416
18/03/2017	Engineering Consultancy	£68,000,000.00	18/03/2017	17/03/2021	Aecom Limited	0616
					Amey OW Limited	0616
					Arcadis Consulting (uk) Limited	0616
					Atkins Ltd	0616
					Capita Property And Infrastructure Ltd	0616
					Ch2m Hill United Kingdom	0616
					Clayton Fourie Consultancy Ltd	0616
					Currie & Brown UK Ltd	0616
					Dougall Baillie Associates Ltd	0616
					Gardiner & Theobald Llp	0616
					lic Technologies Ltd	0616
					Jacobs UK Limited	0616
					Jeremy Benn Associates Limited (t/a Jba Consulting)	0616
					Local Transport Projects Ltd	0616
					Mott Macdonald Limited	0616
					Ove Arup & Partners Scotland Ltd	0616

					Peter Brett Associates LLP	0616
					Rps Consulting Services Limited	0616
					Rsk Environment Limited	0616
					Stantec Uk	0616
					Sweco Uk Ltd	0616
					Systra Ltd	0616
					Tracsis Traffic Data Limited	0616
					Turner And Townsend Project Management Ltd	0616
					Wsp Uk Limited (trading As Wsp I Parsons Brinckerhoff)	0616
					Wyg Environnmet Planning And Transport Ltd	0616
					Punch	0616
06/03/2017	Fostering	£100,000,000.00	25/03/2017	24/03/2019	Barnardo's	1015
					Carevisions Fostering Limited	1015
					Carolina House Trust	1015
					Core Assets Scotland Limited Trading As Foster Care Assoiates Scotland	1015
					Dean And Cauvin Trust	1015
					Foster Care Connect Ltd	1015
					Fostering People Scotland Limited	1015
					Fostering Relations Limited	1015
					Fostering Solutions (Northern) Limited	1015
					Fosterplus (Fostercare) Ltd	1015
					Quarriers	1015
					St Andrew's Children's Society	1015
					Swiis Foster Care Scotland	1015
					The Adolescent And Children's Trust (tact)	1015
					The National Fostering Agency (scotland) Ltd	1015
06/03/2017	Secure Care	£60,000,000.00	01/04/2017	31/03/2019	Good Shepherd Centre	0716
					Kibble Education & Care Centre	0716
					Rossie Young Peoples Trust (Rossie Secure Accommodation Services)	0716
					St Mary's Kenmure	0716

19/04/2017	Energy Efficiency Contractors	£800,000,000.00	01/05/2017	30/04/2019	A.c. Whyte & Co. Ltd	0913
					Absolute Solar And Wind Ltd	0913
					Alternative Heat Ltd	0913
					Bca Insulation Limited	0913
					Campbell & Kennedy Ltd	0913
					Ccg (scotland) Ltd	0913
					Circosense Ltd	0913
					City Building Contracts LLP (RSBi)	0913
					City Technical Services (uk) Ltd	0913
					Cms Enviro Systems Ltd	0913
					E.on Energy Solutions Ltd	0913
					Easy Heat Systems Ltd	0913
					Emtec Energy Ltd	0913
					Energy And Compliance Technology Limited Trading As Compliance365	0913
					Energywise Scotland Ltd	0913
					Everwarm Limited	0913
					Evolve Partnership Limited	0913
					Fes Support Services Ltd	0913
					Fibreglo Insulations Ltd	0913
					Gmg Contractors Limited	0913
					Ingen Technical Services (central) Limited	0913
					Insulated Render Systems (scotland) Ltd	0913
					Iqa Operations Group Ltd	0913
					Miller Pattison Ltd	0913
					Mp Rendering Ltd	0913
					Richard Irvin & Sons Limited, Trading As Richard Irvin Energy Solutions	0913
					Sers Energy Solutions (scotland) Ltd	0913
					Sustainable Building Services (uk) Ltd	0913
					Tk Murray Electrical Limited	0913
					Turner Facilities Management Limited	0913
21/04/2017	Outdoor Play Equipment and	£70,000,000.00	01/05/2017	12/03/2019	All Play (ireland) Ltd	0215

**Artificial
Surfaces**

				Allsports Construction & Maintenance Ltd	0215
				Bendcrete Leisure Ltd	0215
				Doe Sport North Ltd	0215
				Ecosse Sports Ltd	0215
				Eibeplay Ltd	0215
				Hags Smp Limited	0215
				Hawthorn Heights Ltd	0215
				Hugh Harris Limited T/a Fresh-air Fitness	0215
				Hunter Construction (aberdeen) Limited	0215
				Jupiter Play & Leisure Ltd	0215
				Ken Edgar (play Area Specialist) Ltd	0215
				Kompan Scotland Limited	0215
				Landcare Solutions (scotland) Ltd	0215
				Mac Consulting (scotland) Limited	0215
				Mcnab Sport Limited	0215
				Play Services Ireland Limited	0215
				Proludic Ltd	0215
				Russell Leisure Ltd (trading As Russell Play)	0215
				Sac Commercial Ltd	0215
				Scotplay & Sports Limited	0215
				Sports Labs Limited	0215
				Sportsmasters Uk Ltd	0215
				Stri Ltd	0215
				Sutcliffe Play (scotland) Ltd	0215
				T & N Gilmartin (contractors) Ltd	0215
				Wheelscape Ltd	0215
				Wicksteed Leisure Limited	0215
Vehicle Purchase RM1070	£22,500,000.00	01/06/2017	01/12/2018	Audi Uk	0200
				Bmw (uk) Ltd	0200
				Citroen UK Ltd	0200
				Evobus (uk) Ltd	0200

					Fiat Group Automobiles Ltd	0200
					Ford Motor Company Ltd	0200
					General Motors UK Ltd (T/A Vauxhall)	0200
					Honda Motor Europe	0200
					Hyundai Motor Uk Ltd	0200
					Isuzu Uk Ltd	0200
					Iveco Ltd	0200
					Jaguar Landrover Ltd	0200
					Kia Motors (u K) Ltd	0200
					Mercedes-Benz Trucks Uk Ltd	0200
					Mg Motor Uk Ltd	0200
					Nissan Motor (GB) Ltd.	0200
					Peugeot Motor Company Plc	0200
					Renault Trucks Uk Ltd	0200
					Renault UK Ltd	0200
					Seat	0200
					Skoda Auto	0200
					Subaru (uk) Ltd	0200
					The Colt Car Company Ltd T/a Mitsubishi Motors	0200
					Toyota (gb) Plc	0200
					Volkswagen Commercial Vehicles	0200
					Volkswagen Group United Kingdom Limited Trading As Volkswagen Passenger Cars	0200
					Volvo Car Uk Ltd	0200
26/06/2017	Frozen Foods	£100,000,000.00	01/07/2017	30/06/2019	Brake Bros Ltd	1016
					Country Park Foods Ltd T/a Newsholme Food Group	1016
					Delice De France Ltd T/a Aryzta Food Solutions	1016
					Downies Of Whitehills	1016
					Green Gourmet Ltd	1016
					Marlow Foods Ltd T/a Quorn Foods	1016
					Mccain Foods (gb) Ltd	1016
					Reids Food Service Ltd	1016
					Shetland Freezer And Food Centre Limited	1016
					The Uk Foodhall Ltd	1016

					William Yule And Son Limited	1016
30/06/2017	Education Materials	£70,000,000.00	01/08/2017	31/07/2019	Agenta Education Ltd	0916
					Anderson & Partners T/a Penstripe	0916
					Anderson Scientific Limited	0916
					Band Supplies Ltd	0916
					Bgr Musical Instruments Ltd T/a Biggars Music	0916
					Bishop Sports and Leisure Limited	0916
					Clyde Paper & Print	0916
					Community Playthings (Community Products (UK) Ltd)	0916
					Dawsons Music Ltd	0916
					Eduzone Ltd	0916
					Espo Joint Committee Of Local Authorities	0916
					Findel Education (T/A Davies Sports)	0916
					Foams 4 Sports Ltd	0916
					Grosvenor House Papers Ltd	0916
					Haydock Music Ltd	0916
					Kg Music Ltd	0916
					Newitt & Co Ltd	0916
					Normans (burton Upon Trent) Ltd	0916
					Rainbow Musical Instruments Ltd	0916
					Red Dog Music Ltd	0916
					Rimmers Music Ltd	0916
					Specialist Crafts Ltd	0916
					Stringers of Edinburgh	0916
					The Consortium for Purchasing and Distribution Ltd (T/A The Consortium)	0916
					The Homework Diary Company Ltd	0916
					The Wind Section Ltd	0916
					Timstar Laboratory Suppliers Ltd	0916
					Tts Group Ltd	0916
					W. Enterprises (Abdn) Ltd	0916

					Yorkshire Purchasing Organisation	0916
19/07/2017	Organic Waste	£48,000,000.00	01/08/2017	31/07/2020	Barr Environmental Ltd	0816
					Billy Bowie Special Projects Ltd	0816
					Earnside Energy Ltd	0816
					Energen Biogas	0816
					Forth Resource Management Ltd	0816
					Keenan Recycling Ltd	0816
					Levenseat Ltd	0816
					Scottish Water Horizons	0816
					William Munro Construction (highland) Ltd	0816
					William Tracey Ltd	0816
					Gp Green Recycling Ltd.	0816
10/10/2017	Tyres for Vehicles & Plant	£26,000,000.00	01/11/2017	31/10/2021	Alba Tyre Management Ltd	0417
					Auto Technical	0417
					Direct Tyre Management Ltd	0417
					Goodyear Dunlop Tyres Uk Ltd	0417
					Kenway Tyres Ltd	0417
					Mcconechy's tyre service Ltd	0417
					Mckinnon & Forbes Ltd	0417
					Michelin Tyre Public Limited Company	0417
					Redpath Tyres Ltd	0417
					Soltyre Ltd	0417
					Stewartry Tyres (newton Stewart) Ltd	0417
02/11/2017	Recycle and Refuse Containers	£50,000,000.00	03/11/2017	02/11/2020	Abfallbehälter & Container Weber UK Ltd (A&C) Weber	0117
					BioBags (Scotland) Ltd	0117
					British Polythene Ltd (BPI)	0117
					Broxap Ltd	0117
					Craemer UK Ltd	0117
					Cromwell Polythene Limited	0117
					Egbert H. Taylor and Co. Ltd	0117
					ESE Limited	0117
					Eximex Uk Ltd	0117
					Glasdon UK Ltd	0117

					Imperial Polythene Products Limited	0117
					J&HM Dickson Ltd	0117
					Leafield Environmental Ltd	0117
					One51 Es Plastics (uk) Ltd T/a Mgb Plastics	0117
					Ridley Recycling Limited T/a Peter Ridley Waste Systems	0117
					Sphere Professional (UK) Ltd (Sai Pac)	0117
					SSI Schaefer Ltd.	0117
					Storm Environmental Ltd	0117
					Straight Limited	0117
					Weir & Carmichael Ltd	0117
					Wybone Ltd	0117
13/11/2017	Bottled Gas	£8,000,000.00	06/11/2017	31/10/2019	Air Products Public Limited Company	0817
					Calor Gas Limited	0817
					Flogas UK Ltd	0817
13/11/2017	Laundry Equipment	£4,400,000.00	06/11/2017	05/11/2019	Jla Limited	0917
					Mag Equipment Ltd	0917
					Thain Commercial Ltd	0917
10/11/2017	Vehicle & Plant Hire	£60,000,000.00	10/11/2017	31/10/2021	A M Phillip Trucktech Ltd	0217
					Ab2000 Ltd	0217
					Accident Repair Centre (scotland) Limited Trading As Arc Fleet Services	0217
					Acl Hire Limited	0217
					Acre Industrial & Cleaning Services Ltd	0217
					Aebi Schmidt Uk Ltd	0217
					Alloa Hire Centre Ltd Trading As Ahc Tools	0217
					Andrews Sykes Hire Limited	0217
					Arnold Clark Finance Ltd (car & Van Rental)	0217
					Arvill Plant And Tool Hire	0217
					Ashtead Plant Hire Co Ltd	0217
					Avis Budget Uk Ltd	0217
					B&B Contracts Ltd.	0217

Brown Plant Hire Ltd	0217
Bryson Tractors Ltd.	0217
C P Davidson & Sons Ltd	0217
Campbell Plant Hire Limited	0217
Clee Hill Plant Ltd.	0217
Cooks Van Hire Limited	0217
DAMM Environmental Ltd	0217
Dawsonrentals Materials Handling Equipment Ltd	0217
Doherty And Lafferty Ltd	0217
Econ Engineering Ltd	0217
Elev8 Access Platforms Ltd	0217
Enterprise Rent A Car Uk Ltd	0217
Enviroclean (scotland) Ltd	0217
Europcar Group Uk Limited	0217
FMS Vehicle Rental Ltd	0217
Fraser C Robb	0217
GAP Group Ltd (T/A GAP Plant & Tool Hire)	0217
Groundwater Lift Trucks Ltd	0217
Gulliver's Truck Hire Ltd.	0217
Hamilton Industrial Services Ltd	0217
Hamilton Tarmac	0217
Hertz UK Ltd	0217
Hillhouse Quarry Group Ltd	0217
Hyndford Plant Ltd	0217
Jamieson Plant Hire & Contractor	0217
Lomond Plant Ltd	0217
M6 Vehcile Hire Ltd	0217
Mac Asphalt Ltd	0217
Mulholland Plant Services Ltd	0217
Murdoch Mackenzie Construction Ltd	0217
Mv Commercial Ltd	0217
Nationwide Platforms Ltd	0217
ND Brown Ltd	0217
Northgate Vehicle Hire Ltd	0217
Palmaris Plant Hire Ltd	0217

					Ravenhill Ltd	0217
					Richard Murray Trading As Richard Murray Plant Hire	0217
					Riverside Truck Rental Ltd	0217
					Sweeney Plant & Vehicle Hire Ltd	0217
					Tom Vehicle Rental Limited	0217
					Toyota Material Handling Uk Limited	0217
					Trash UK Ltd	0217
					Turner Hire Drive Ltd	0217
					Underground Inspection Services Ltd	0217
					William Hamilton & Sons Limited	0217
					Multevo Limited Trading As Multihog Uk Limited	0217
					J & M Murdoch & Son Ltd	0217
					Essential Fleet Services Limited	0217
24/01/2018	Pest Control Services	£6,000,000.00	08/12/2017	30/11/2019	Anderson Pest Prevention	1217
					Graham Environmental Services Limited (t/a Graham Pest Control)	1217
					North East Falconry Limited	1217
					Orbis Protect Limited	1217
					Pestguard Services (scotland) Ltd	1217
					Mitie Pest Control Limited	1217
					Killgerm Chemicals Limited	1217
08/12/2017	Steeplejack Services	£7,000,000.00	08/12/2017	31/10/2019	Horizon Specialist Contracting Ltd	1017
					Northern Steeplejacks (edinburgh) Limited	1017
					Pendrich Height Services Ltd	1017
01/01/2018	Heavy Vehicles	£160,000,000.00	01/01/2018	31/12/2021	A M Phillip Trucktech Ltd	0317
					Aebi Schmidt Uk Ltd	0317
					Bunce (Ashbury) Ltd	0317
					C P Davidson & Sons Ltd	0317
					Cartwright Fleet Services (glasgow) Ltd	0317
					Dennis Eagle Limited	0317
					Econ Engineering Ltd	0317
					Farid Hillend Engineering Limited	0317

					Geesink Norba Ltd	0317
					Hako Machines Ltd	0317
					Isuzu Truck (UK) Ltd	0317
					James A. Cuthbertson Ltd	0317
					Johnston Sweepers Ltd	0317
					Kerr & Smith (Glasgow) Ltd	0317
					Nu-Track Ltd	0317
					Scarab Sweepers Ltd	0317
					Volvo Group Uk Ltd T/a Volvo Truck And Bus Centre North & Scotland	0317
					Western Automobile Company Ltd t/a Western Commercial	0317
					Whale Tankers Ltd	0317
					Ntm-gb Ltd*	0317
					Stock Sweepers Limited	0317
28/02/2018	Swimming Pool Chemicals	£5,000,000.00	08/01/2018	07/01/2020	Air Products Public Limited Company	1517
					Brenntag Uk Limited	1517
					Complete Pool Controls Limited	1517
					Univar Bv	1517
12/01/2018	Water Coolers	£6,000,000.00	08/01/2018	07/01/2020	Aquaid Franchising Ltd (t/a Aquaid Glasgow)	1317
					Water Coolers Ltd	1317
					Selecta U.k. Ltd	1317
					Angel Springs Ltd (t/a Waterlogic)	1317
					Total Refreshment Solutions Ltd T/a Alba Water	1317
					Eden Springs Uk Ltd	1317
					Cameron Water Ltd	1317
					Early Bird Catering Ltd	1317
21/02/2018	Catering Machines	£8,000,000.00	16/01/2018	07/01/2020	Integrated Catering Equipment Uk Ltd	2117
					Jla Limited	2117
					Lovat's Catering Engineering Services Ltd T/a Lovat's Group	2117
					Scomac Catering Equipment Ltd	2117
					Sparks Mechanical Services Ltd	2117
					Merchant City Refrigeration (scotland) Ltd	2117

					Catering Supplies And Repairs Company Ltd	2117
					Fast Fixx	2117
12/04/2018	Digital Publications and Services	£4,000,000.00	01/02/2018	31/01/2020	Bolinda Uk Ltd	2517
					Ebsco International Inc	2517
					Ulverscroft Large Print Books Ltd	2517
					Wf Howes Ltd	2517
					Overdrive Inc	2517
16/02/2018	Library Books & Textbooks	£56,000,000.00	01/02/2018	31/01/2020	A.T Little & Sons (T/A Browns Books)	0617
					Askew & Holts Library Services Ltd	0617
					Bertram Trading Limited t/a Bertram Library Services	0617
					Blackwell	0617
					Changeover Ltd T/a Moovies Distribution	0617
					Glowworm Books & Gifts Ltd	0617
					Harper Collins Publishers Limited T/a Collins Learning And Leckie & Leckie	0617
					Hodder & Stoughton Limited t/a Hodder Gibson	0617
					John Smith & Son Group Ltd	0617
					Kelvin Books Ltd	0617
					Oxford University Press	0617
					Pearson Education Ltd	0617
					Peters Limited	0617
					Prim-Ed Publishing Ltd	0617
					Scotia & Chameleon Books Ltd	0617
					Star Books	0617
					Teejay Publishers	0617
					Trans UK Supplies Ltd	0617
					Waterstones Booksellers Ltd	0617
					Scholastic Ltd	0617
					Library Magna Books Limited	0617
					Ulverscroft Large Print Books Ltd	0617
					Bright Red Publishing Ltd	0617
08/01/2018	Trade Materials	£40,000,000.00	17/02/2018	16/02/2021	Bell Decorating Group Limited	0717

					Bunzl UK Ltd (T/A Greenham)	0717
					Cromwell Tools Limited	0717
					Crown Paints Ltd	0717
					Jewsons (May Trade Under Other Name for Each Contract)	0717
					MacGregor Industrial Supplies Ltd	0717
					P F Cusack (Tools Supplies) Limited	0717
					PPg Architectural Coatings UK Ltd	0717
					Valtti Specialist Coatings Limited	0717
					S.i.i.s. Limited	0717
					Brammer Uk Limited (t/a Buck & Hickman)	0717
					Imperial Chemical Industries Limited (t/a Ici Paints Akzonobel)	0717
					A1 Ironmongery Limited	0717
					Highland Industrial Supplies Limited	0717
08/01/2018	Milk	£36,000,000.00	01/03/2018	28/02/2021	D & D Dairies Ltd	1917
					George Anderson & Sons	1917
					Grahams the Family Dairy Ltd	1917
					Müller Uk & Ireland Group Llp T/a Müller Milk & Ingredients	1917
					Shetland Farm Dairies Ltd	1917
					D J Campbell & Son	1917

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
2017/18

Review of Regulated Procurement - Performance against our strategy, operating plan and objectives for 2017/18




1. Purpose of the report

This report presents an update on our performance against the 2017/18 operating plan.

2. Reporting methodology

Progress reports are produced quarterly to track Scotland Excel's performance against operating plan activities. 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 activities and uses a 'traffic light' symbol to provide a quick guide to the status of each activity:

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

3. Progress to date

The following report provides an update on activities undertaken during financial year to 31 March 2017. The majority of activities have progressed in line with plans and are indicated by a green symbol. A small number of project-based activities have not been fully delivered in line with plans and are indicated as amber or red. The report also tracks performance against ten key performance indicators (KPIs).




Operating Plan





2017 – 2018



Year End Report

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

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



Activity	Year 3 Priorities	RAG status	Progress summary
(a) Develop and implement a contract plan aligned to the strategic priorities of member authorities	<ul style="list-style-type: none"> • Resource and implement contract delivery plans including 11 'small value' contracts • Develop and implement a procurement strategy for older people's care services • Deliver an opportunity analysis for adult supported living and care at home commissioning • Provide ICT procurement services for the local government Digital Office • Support SEEMiS with the procurement of a national education MI system • Monitor CCS partnership and develop proposals for future procurement partnerships • Review and update procurement strategies for all key category areas 		<ul style="list-style-type: none"> • Eight 'small value' contracts were delivered during 2017-18, with a further contract due to be awarded in April. Of the two contracts not delivered, one was found to be unsuitable for collaboration while the other did not attract sufficient market interest. • A proposal for a new Scottish Care Home Framework has been developed. A sourcing strategy will be co-produced with providers, commissioners and Health & Social Care Partnerships (HSCPs) in 2018-19. • Following market analysis and stakeholder engagement, it has been agreed that a single 'care and support' framework will be developed for adult supported living and care at home services. Twenty-one councils have indicated an interest in using the framework, and a procurement strategy will be developed by June 2018. • Scotland Excel is continuing to provide procurement support for the Digital Office. Eighty suppliers participated in a webinar in January 2018, and ongoing engagement with local authorities is taking place to identify collaborative opportunities. A new care management solution is being explored with seven councils and NHS Scotland. • The initial procurement project for SEEMiS has been completed successfully and this partnership will continue into 2018-19. • Councils were migrated to the Crown Commercial Services (CCS) light vehicles framework in June 2017 to capitalise on economies of scale and release procurement resources. Feedback from councils has been positive, and a full survey on framework usage is planned for June 2018. • Updated category strategies have been published on Scotland Excel's website.




<p>(b) Develop and implement a strategy and plan for the delivery of contract and supplier management</p>	<ul style="list-style-type: none"> • Complete the roll out of the new CSM programme across the contract portfolio 		<ul style="list-style-type: none"> • The Contract & Supplier Management (CSM) programme launched in 2017 did not support the required levels of participation or feedback. Three alternative options were evaluated, and a new survey tool is now being trialled before being rolled out across the organisation in 2018-19.
<p>(c) Develop and implement a strategy and plan for improving supplier performance</p>	<ul style="list-style-type: none"> • Deliver the 2018 Supplier Excellence Awards • Incorporate supplier development into the 2018 Scotland Excel Conference • Pilot a KSM programme and extend to other key suppliers based on results 		<ul style="list-style-type: none"> • The Supplier Excellence Awards ceremony took place on 20 February 2018, and was attended by over 350 guests. Feedback on the awards programme has been very positive, and it generated significant media coverage for Scotland Excel and participating suppliers. • Fifty-two supplier delegates attended the second day of the Scotland Excel Conference which focused on building positive relationships. • Plans for a Key Supplier Management (KSM) programme are on hold pending the roll out of the new CSM programme. Relationships with key suppliers continue to be managed by procurement teams in the interim.
<p>(d) Manage the rollout of a new national procurement capability assessment to the local government sector</p>	<ul style="list-style-type: none"> • Complete the first cycle of PCIP assessments with participating councils • Consult on plans for a second cycle of PCIP assessments 		<ul style="list-style-type: none"> • Procurement & Commercial Improvement Programme (PCIP) assessments have been completed with all 32 Scottish local authorities. • A second cycle of PCIP assessments is being planned for 2018-19.
<p>(e) Develop and implement a programme to lead and support the development of procurement and commercial capability</p>	<ul style="list-style-type: none"> • Develop and deliver a rolling programme of procurement capability and change services for local authorities • Deliver an Annual Conference to support development in Feb 2018 • Deliver Scottish Government funded procurement improvement programme for housing associations 		<ul style="list-style-type: none"> • Thirty-five change projects were delivered for councils during 2017-18. A national programme to address the four priority areas identified from PCIP assessments was launched in February 2018 and will continue throughout 2018-19. Aberdeen City Council has commissioned Scotland Excel to undertake a six-month consultancy project, and a two-year transformation programme for Fife Council is expected to be approved in April 2018. • The Scotland Excel Annual Conference was held at the Radisson Blu in Glasgow on 20-21 February 2018, and was attended by 110 delegates. • Thirteen PCIP assessments were completed with housing associations during 2017-18 as part of the Scottish Government programme. Twenty-nine assessments have been scheduled to take place by September 2018, with a further eleven to be completed by March 2019.

<p>(f) Develop and implement a 'procurement academy' to support professional capability and encourage new entrants to public procurement</p>	<ul style="list-style-type: none"> • Roll out L & D programmes in line with the strategy • Develop plans for delivering a L & D programme for social care commissioning • Develop a proposal to support the Scottish Government's PPOT initiative 		<ul style="list-style-type: none"> • Three Chartered Management Institute (CMI) accredited Leadership & Management courses ran in Inverclyde, Perth and Stirling during 2017-18, with a fourth scheduled to begin in Fife in April 2018. A Chartered Institute of Procurement & Supply (CIPS) accredited course was launched in January 2018. Ten practitioner workshops and two masterclasses also took place during the year. • Scotland Excel has been in discussion with partners including the Scottish Government, Healthcare Improvement Scotland and Social Work Scotland to scope learning and development requirements for social care commissioning. Options for incorporating these into the Scotland Excel Academy will be completed in 2018-19. • Scotland Excel has continued to support the Procurement People of Tomorrow (PPOT) initiative through co-chairing the Scottish Government's Professional Practice Strategic Forum. Scotland Excel also worked with Skills Development Scotland to develop a Graduate Level Apprenticeship in business management.
<p>(g) Develop and implement a shared service offering for councils which meets their requirements in a changing public sector landscape</p>	<ul style="list-style-type: none"> • Develop a shared services strategy to inform future service development proposals 		<ul style="list-style-type: none"> • Scotland Excel explored a number of new opportunities during 2017-18. Funding has been secured from eleven local authorities to develop a national house building framework, and discussions are ongoing with Transport Scotland on proposals to support the development of an electric vehicles charging infrastructure. Chargeable consultancy projects for local authorities have also been commissioned or are in the pipeline.

Goa1 2: Being sustainable in everything we do



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




Activity	Year 3 Priorities	RAG status	Progress summary
(a) Develop and implement strategies for responding to procurement and/or public sector legislation	<ul style="list-style-type: none"> • Develop and implement plans to comply with GDPR regulations • Monitor risks/opportunities arising from the Community Empowerment Act • Engage with IJB Chief Officers to identify HSCI procurement opportunities • Develop proposals to support councils with early learning and childcare procurement • Update waste category strategy to align with legislative landscape 		<ul style="list-style-type: none"> • Scotland Excel is on track with plans to ensure compliance with General Data Protection Regulation (GDPR) which take effect from 25 May 2018. GDPR training sessions have been delivered for Scotland Excel staff and customers as part of these plans. • No major risks or opportunities identified for the sector in connection with the Community Empowerment Act during 2017-18. • Scotland Excel has continued to support the integration of health and social care throughout 2017-18. Good working relationships have been established with Chief Officers and Chief Finance Officers within Health & Social Care Partnerships (HSCPs) and their input has informed new developments within the social care portfolio. • Scotland Excel developed proposals to support the expansion of early learning and childcare provision but has been unable to secure funding to progress further. Efforts to secure funding will continue in 2018-19. • The waste category strategy has been updated and published on the Scotland Excel website.
(b) Ensure Scotland Excel's collaborative frameworks support local and national government policy priorities	<ul style="list-style-type: none"> • Continue to support national policy outcomes in social care frameworks • Continue to support the roll out of CRDG recommendations 		<ul style="list-style-type: none"> • National policy outcomes for looked after children were incorporated into the renewal of the children's residential care framework in March 2018. National health and wellbeing outcomes were considered as part of proposals for older people's care homes and adult care services which were developed during 2017-18. • Scotland Excel participated in Construction Review Delivery Group (CRDG) meetings throughout 2017-18. The work of the delivery group has now been completed and the Scottish Government has set up an internal team for the ongoing management of construction policy.

<p>(c) Ensure Scotland Excel's collaborative frameworks support positive local economic outcomes</p>	<ul style="list-style-type: none"> • Support SDP public procurement training for Scottish SMEs • Review options for including community benefits measures as part of the new CSM programme • Develop a strategy for supported businesses, including delivery of a business development event 		<ul style="list-style-type: none"> • Scotland Excel delivered ten Supplier Development Programme (SDP) training sessions and attended four national and local 'Meet the Buyer' events during 2017-18. • Plans for including community benefit measures as part of Scotland Excel's CSM programme are on hold pending the roll out of a new programme in 2018-19. • Scotland Excel's supported business event took place in Glasgow on 08 February 2018, and was attended by 60 delegates from supported businesses and council economic development and procurement teams. Paul Wheelhouse MSP, Minister for Business, Innovation and Energy and Chair of the Scottish Government's Supported Business Advisory Group, spoke at the event. Further actions to create opportunities for supported businesses will be considered in 2018-19.
<p>(d) Ensure Scotland Excel's collaborative frameworks support local government environmental duties and policies</p>	<ul style="list-style-type: none"> • Continue work with partners to align the waste category strategy with national programmes • Include measure for environmental impact within the new CSM programme 		<ul style="list-style-type: none"> • Scotland Excel has been working with Zero Waste Scotland and councils on new contract arrangements for recyclable and residual waste which will be implemented in 2018-19. A dynamic purchasing solution will enable councils to remain aligned to environmental policy and legislation while allowing new entrants into the market. • Plans for including environmental impact measures as part of Scotland Excel's CSM programme are on hold pending the roll out of a new programme in 2018-19.
<p>(e) Champion the development and dissemination of best practice in sustainable procurement</p>	<ul style="list-style-type: none"> • Monitor the impact of Scotland Excel's sustainable procurement strategy • Work with national partners to develop enhancements to the national sustainable toolkit • Continue to evolve Scotland Excel's horizon scanning programme 		<ul style="list-style-type: none"> • Scotland Excel has continued to monitor the impact of its sustainable procurement strategy throughout 2017-18. Sustainability considerations and benefits are detailed within each contract award report. • Scotland Excel has been working to enhance the national sustainability toolkit as part of the Scottish Government Best Practice Forum. In 2017-18, the Forum reviewed the implications of the Equality Duty and completed a policy draft for Equality Impact Assessment. • Horizon scanning meetings took place quarterly throughout the year to review the external environment and identify any new risks and opportunities.

Goa1 3: Placing customers at the heart of our business




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


Activity	Year 3 Priorities	RAG status	Progress summary
(a) Develop and implement a portfolio of account management services that meet the collective and individual needs of local authority customers	<ul style="list-style-type: none"> Continue to develop and implement improvements to account management services 		<ul style="list-style-type: none"> Account managers delivered Quarterly Business Reviews with local authority procurement leads throughout 2017-18. These discussions have provided valuable feedback to inform Scotland Excel's business change and learning and development activities.
(b) Develop and implement a stakeholder engagement strategy that support the delivery of first class customer experience across all of our services	<ul style="list-style-type: none"> Complete the stakeholder engagement strategy Develop and implement a senior stakeholder engagement plan Initiate a customer care forum to support ongoing improvements to customer service Publish a report on the results of the 2017 customer satisfaction survey Develop a 'future digital' strategy to support online delivery of customer information and services 		<ul style="list-style-type: none"> Completion of the stakeholder engagement strategy was put on hold to release staff resources for the Scotland Excel Conference and Supplier Excellence Awards. This will now be revisited in 2018-19. Scotland Excel's Executive Team held engagement meetings with elected members and senior stakeholders throughout the year. Plans to support ongoing engagement will be developed as part of Scotland Excel's communications plan. The customer care forum will now be established in 2018-19 on completion of the stakeholder engagement strategy. Tailored reports for senior stakeholders, procurement leads and staff on the findings of the customer satisfaction survey were produced and distributed to stakeholders. A Digital/ICT strategy has been completed, and priorities for new developments in 2018-19 have been agreed with the Senior Management Team.

<p>(c) Develop and implement a corporate communications strategy that enhances and protects Scotland Excel's corporate reputation</p>	<ul style="list-style-type: none"> • Complete the marketing and communication strategy • Develop and implement a plan to enhance Scotland Excel's profile and reputation • Continue to deliver marketing/communications initiatives to promote Scotland Excel services 		<ul style="list-style-type: none"> • Scotland Excel's marketing and communications strategy has been completed. • A communications plan which sets out high level priorities for corporate communications, public affairs and stakeholder engagement has been completed. • Scotland Excel's marketing and communications team delivered a full programme of activities during 2017-18 including campaigns and event management for the Supplier Excellence Awards. Other activities included press releases, social media, web content, brochures, advertisements, award entries, and exhibition support.
<p>(d) Develop and implement a model for associate members which delivers clear business and financial benefits to Scotland Excel and the membership base</p>	<ul style="list-style-type: none"> • Continue to recruit housing associations in line with the associate member strategy • Develop an associate member offering for third sector organisations 		<ul style="list-style-type: none"> • Fifteen housing associations were recruited as associate members during 2017-18. • Due to the launch of a Scottish Government-funded third sector organisation, Procurement 4 Partnership (P4P), Scotland Excel has delayed plans to develop an associate member offering for this market until 2018-19 to allow for further research.
<p>(e) Develop and implement a programme for engaging with the wider public sector to ensure Scotland Excel has the right partnerships in place to support the needs of its customers</p>	<ul style="list-style-type: none"> • Continue to host and/or attend forums to gather sector views and share information • Continue to represent the sector on matters relating to public procurement • Continue to engage with relevant stakeholders in the wider public sector environment 		<ul style="list-style-type: none"> • Scotland Excel held and/or attended forums for sector stakeholders throughout 2017-18 including Commercial User Intelligence Groups (UIGs), steering groups for procurement capability and social care, and attendance at the Scottish Local Government Procurement Forum. • Scotland Excel represented sector interests at meetings throughout 2017-18 including government forums for collaborative procurement, construction, best practice and professional development. • Scotland Excel has continued to engage with a wide range of stakeholders and partners. This activity will be formalised as part of the stakeholder engagement strategy in 2018-19.




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

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

Activity	Year 3 Priorities	RAG status	Progress summary
(a) Develop and implement a strategy to support staff recruitment, retention, development, performance and engagement	<ul style="list-style-type: none"> Complete the development and implementation of an organisational development strategy 		<ul style="list-style-type: none"> An organisational development strategy is in place to provide structure for workstreams in Culture & Values, Leadership & Talent Management, Reward & Recognition, and Systems & Processes. Implementation of the organisational development strategy will continue in 2018-19 with support from Investors in People (IIP).
(b) Develop and implement programmes to support the continuous improvement of business performance, systems and processes	<ul style="list-style-type: none"> Agree and deliver 2017-18 internal transformation projects Implement a spend data management and reporting solution Continue to plan and implement the migration of the ICT infrastructure to a cloud environment Undertake assessment to renew CIPS accreditation 		<ul style="list-style-type: none"> Scotland Excel's business change team managed five internal projects in 2017-18 to support continuous improvement. Development of a data management and reporting solution is now underway and the first phase is expected to be completed by the end of June 2018. During 2017-18, Scotland Excel's ICT team migrated staff to cloud-based Office 365 software and Windows 10 to support agile working. Staff can now access ICT resources and files remotely. Scotland Excel has successfully renewed its Chartered Institute of Procurement & Supply (CIPS) accreditation following a rigorous assessment.
(c) Ensure that Scotland Excel delivers its plans through effective governance, risk management and policies	<ul style="list-style-type: none"> Explore options for governance models which support the future growth of Scotland Excel 		<ul style="list-style-type: none"> An options appraisal for governance models to support future growth was presented to the Joint Committee in December 2017. Further work has been taking place to finalise recommendations which will be presented to the Joint Committee in June 2018.

<p>(d) Develop and implement a strategy for gathering, analysing and distributing business intelligence within Scotland Excel and across the sector</p>	<ul style="list-style-type: none"> • Expand the use of BI tools across the organisation to support internal/external delivery of data and reports 		<ul style="list-style-type: none"> • Several interactive reports have been developed using a new Business Intelligence (BI) tool during 2017-18, and this will be rolled out across the organisation and to customers in 2018-19.
<p>(e) Develop and implement a clear, transparent and sustainable funding and delivery model for Scotland Excel</p>	<ul style="list-style-type: none"> • Hold 4 regional consultation workshops for new strategy development • Develop a new corporate strategy for 2018-22 • Explore options for funding models to support the new strategy 		<ul style="list-style-type: none"> • Five regional workshops with local authority procurement leads to consult on the new strategy took place in February and March 2018. • The new corporate strategy and operating plan is in development and will be presented to the Joint Committee in June 2018. • An initial paper on funding was submitted to the Joint Committee in December 2017. Further work has been taking place to finalise recommendations which will be presented to the Joint Committee in June 2018.

Report Key

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

Key Performance Indicators

KPI	Link to outcomes	Q4 Status
No. & value of contracts delivered v plan	<ul style="list-style-type: none"> Our services support the effective and efficient delivery of public services 	<ul style="list-style-type: none"> 31 contracts delivered, renewed or extended against target of 31 by year end £1.01bn portfolio value against £1bn target by year end
Percentage & value of savings v target (excluding social care)	<ul style="list-style-type: none"> Our customers are satisfied with our services and achieve a measurable return on their investment 	<ul style="list-style-type: none"> Average savings of 3.5% against a rolling 5% target (2015-18) £3.8m estimated saving in the last recorded quarter (Jan-Mar 2018)
No. of PCIP assessments completed v schedule	<ul style="list-style-type: none"> Our expertise supports continuous improvement in procurement performance 	<ul style="list-style-type: none"> 15 assessments completed against 15 targeted
No. of Scottish suppliers & percentage SMEs	<ul style="list-style-type: none"> Our services help to deliver positive and sustainable outcomes for communities and service users 	<ul style="list-style-type: none"> 479 Scottish suppliers of which 76.8% are SMEs
No. of community benefits realised to date	<ul style="list-style-type: none"> Our services support the implementation of national and local policy priorities 	<ul style="list-style-type: none"> 349 jobs 220 apprenticeships 58 work placements 60,646 hours work experience 4,958 hours volunteering/mentoring £465k value of other initiatives
Customer satisfaction statistics & trends ¹	<ul style="list-style-type: none"> Our customers are satisfied with our services and achieve a measurable return on their investment 	<ul style="list-style-type: none"> 82.4% of procurement stakeholders 80.8% of senior stakeholders
Website usage statistics & trends	<ul style="list-style-type: none"> Our customers receive relevant communication and support 	<ul style="list-style-type: none"> 8,014 visitors in Q4 19,175 user sessions in Q4
Media coverage v target	<ul style="list-style-type: none"> Our reputation demonstrates the value of collaboration 	<ul style="list-style-type: none"> 66 media items placed to date against target of 50 by year end
Income from associate members v target	<ul style="list-style-type: none"> Our reputation demonstrates the value of collaboration 	<ul style="list-style-type: none"> £55.8k income against a £60k target
Staff turnover v headcount	<ul style="list-style-type: none"> Our people, policies, processes and technology optimise our value 	<ul style="list-style-type: none"> 4.7% staff turnover rate 70 permanent staff

Report issued: June 2018

¹ Percentage of respondents reporting their overall satisfaction as 'very good' or 'good' in the 2016-17 customer satisfaction survey

Appendix 4
Planned Procurement to 31/03/2020

Frameworks due for renewal (or subject to contract extension) by Dec 2020

Short Contract Title	Schedule No	End Date of current framework
Street Lighting Bulk Renewal of Luminaires	1013	30/06/2018
Demolition	1115	31/07/2018
Community Meals	0115	31/08/2018
Buildings Related Engineering Consultancy	1113	30/09/2018
Domestic Furniture and Furnishings	0815	31/10/2018
Plumbing and Heating Materials	1714	30/11/2018
Vehicle Purchase RM1070	0200	01/12/2018
Telecare and Telehealth Technologies	0614	31/12/2018
Bitumen Products	0516	28/02/2019
Personal Protective Equipment	0416	28/02/2019
Outdoor Play Equipment and Artificial Surfaces	0215	12/03/2019
Fostering	1015	24/03/2019
Asbestos	1114	31/03/2019
Building and Timber Materials	1314	31/03/2019
Electrical Materials	0615	31/03/2019
Presentation & Audio Visual Equipment	1214	31/03/2019
Security (Equipment)	0814b	31/03/2019
Security (Services)	0814	31/03/2019
Secure Care	0716	31/03/2019
Waste Disposal Equipment	0315	31/03/2019
Energy Efficiency Contractors	0913	30/04/2019
Customer Service Platform	0415	31/05/2019
Frozen Foods	1016	30/06/2019
Education Materials	0916	31/07/2019
Bottled Gas	0817	31/10/2019
Steeplejack Services	1017	31/10/2019
Laundry Equipment	0917	05/11/2019
Pest Control Services	1217	30/11/2019
Catering Machines	2117	07/01/2020
Swimming Pool Chemicals	1517	07/01/2020
Water Coolers	1317	07/01/2020
Digital Publications and Services	2517	31/01/2020
Library Books & Textbooks	0617	31/01/2020
Education And Office Furniture	0216	29/02/2020
Fire Safety Products	1617	15/04/2020
Groceries & Provisions	0515	30/04/2020
Catering Sundries	0915	31/07/2020
Organic Waste	0816	31/07/2020
Recycle and Refuse Containers	0117	02/11/2020
Vehicle Parts	0116	31/12/2020

New Contract Areas

<u>Contract Title</u>	<u>Forecast Delivery date</u>
Vocational Training Service Providers	Dec 18
Power Tools	June 18
Boiler Maintenance	July 18
First Aid Materials	Sept 18
Commercial Catering Equipment	Oct 18
Social Work Health Care System	Nov 18
Care Home Services for older People	Jan 19
Care and Support	Aug 19
New Build Housing	Sept 19