Scotland Excel

To: **Joint Committee**

On: **21 June 2019**

**Report
by
Director Scotland Excel**

Operating Plan Report 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:

W	Project or activity 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 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.

4.   Recommendation

The members of the Joint Committee are invited to note Scotland Excel's performance in the delivery of the Operating Plan 2018-19.

SCOTLAND EXCEL

Operating Plan

2018 – 2019

Year End Report

Goa1 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	• Develop plans which support direct engagement with local authority services to identify new collaborative procurement opportunities	G	• 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.
	• Complete the sourcing strategy and initiate the tender process for a new build housing framework on behalf of participating local authorities	G	• 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.
	• Implement a procurement strategy for older people care home services for that provides choice, continuity of care and innovation in service delivery	A	• 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.
	• Implement the procurement strategy for adult care and support services and secure sustainable funding for ongoing delivery as part of the social care portfolio	G	• 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.
	• Continue to pursue funding to deliver proposals which support the expansion of early learning and childcare provision	B	• 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.

	• Develop and implement contract and supplier management (CSM) and key supplier management (KSM) programmes which monitor and enhance the performance of Scotland Excel contracts	**G**	• 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.
	• 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	**G**	• 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.
	• Continue to inform and support national procurement policy in consultation with the local government procurement community	**G**	• 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.
1.2 Deliver programmes which lead and develop professional, organisational and commercial capability	• Develop and deliver a targeted programme of change projects based on development needs identified by Procurement & Commercial Improvement Programme (PCIP) assessments	**A**	• Three of the six change projects targeted for 2018-19 have been completed. A further two projects are in 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.

	• Deliver a second cycle of local government PCIP assessments for all local authorities	G	• PCIP assessments had been completed with 25 councils by the end of March 2019. Assessments will be completed with all councils by September 2019.
	• 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	G	• 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.
	• Continue to develop and deliver accredited work-based learning programmes through the Scotland Excel Academy	G	• 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.
	• Develop and deliver a programme of practitioner workshops, masterclasses and events to lead best practice through the Scotland Excel Academy	A	• 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.

	• Continue to develop Scotland Excel Academy online resources to support learning programmes and create a community platform for sharing best practice	G	• 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	• 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	A	• 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.
	• Continue to develop data analytic tools and resources to support the expansion of the contract portfolio and provide management information to the sector	G	• 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.
	• Continue to develop and share access to the Cost of Care calculator to support the delivery of affordable and sustainable social care services	A	• 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.
	• Continue to develop and share access to Indexation Modelling to track market influences on costs	G	• 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.

	• Deliver market analysis reports in support of new collaborative procurement or service opportunities	**B**	• 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.
	• Develop plans to roll out data analytic tools to staff across the organisation	**W**	• 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	• Continue to work with the Scottish Government, COSLA and other partners to support the development and/or delivery of national policy in social care	**G**	• 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.
	• 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	**G**	• 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.
	• 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	**W**	• 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.
	• Continue to work with the Scottish Government, Zero Waste Scotland and other partners to support the development and/or delivery of national environmental policy	**G**	• 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.

	• Develop and deliver a calendar of communications activities which promotes our knowledge and experience in support of our policy and public affairs goals	G	• 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.
	• 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	G	• 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	• Develop plans to increase the proportion of Scotland Excel suppliers paying their staff the Scottish Living Wage	B	• 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.
	• Continue to develop community benefit models which enable councils to achieve direct benefits for their areas	G	• 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,
	• 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	G	• 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	• Continue to work with the Supplier Development Programme (SDP) to raise awareness of public procurement opportunities and encourage participation among Scottish SMEs	G	• 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.
	• Increase direct and supply chain opportunities for Scottish SMEs and contractors within Scotland Excel contracts, particularly within the construction portfolio	G	• Opportunities to encourage participation by Scottish SMEs continue to be considered in strategy development for all contracts.
	• Encourage housing associations to consider the local economic impact they can deliver through the use of Scotland Excel contracts	G	• 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	• 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	G	• Scotland Excel's tender documentation continues to include appropriate environmental considerations including, where appropriate, the weighting and scoring of emissions.
	• 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	G	• Scotland Excel's tender documentation continues to include appropriate cost evaluation to ensure that lifetime value is assessed.
	• 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	B	• 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.
	• Develop plans for assessing and mitigating the environmental impact of Scotland Excel's activities	W	• 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	• 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	B	• An Annual Procurement Report for 2017-18 has been published in line with the requirements of the Procurement Reform (Scotland) Act 2014.
	• Continue to work with national partners on the development of sustainable procurement guidance and tools	G	• 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.

	• Develop plans to increase the local government sector's sustainable procurement knowledge and capability through the Scotland Excel Academy	W	• 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.
	• Develop and implement plans to promote sustainable procurement to elected members and senior officers to support a 'whole organisation' approach	W	• 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	• 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	G	• 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.
	• 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	G	• 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.
	• Explore the feasibility of providing additional services requested by customers, incorporating the findings into future operational plans	W	• 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.
	• 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	A	• 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	• Develop a model for incorporating community engagement, where appropriate, into the development of procurement strategies	G	• 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.

	• Continue to engage directly with service users, where appropriate, to ensure their needs are considered within service design	G	• 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 by involved in the evaluation of meals for the upcoming community meals framework renewal in 2019-20.
	• 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	G	• 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.
3.3 Represent the collective views of stakeholders at a national level	• Review Scotland Excel's representation activities to ensure that these are targeted where they can have the greatest impact	A	• 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.
	• Establish a model for undertaking representation activities, including a clear feedback loop for customers and/or communities	W	• 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.
	• 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	G	• 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	• 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	G	• 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.
	• Develop and implement a talent management programme to inspire and develop staff, increase Scotland Excel's capability, and support succession planning	W	• 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.
	• Develop plans for agile working to create a productive working environment that benefits staff, Scotland Excel, and customers	G	• 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.

Goa1 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	• Complete the review of Scotland Excel's governance and funding models, presenting recommendations to the Joint Committee for approval	B	• 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.
	• Develop plans to implement the governance recommendations approved by the Joint Committee	B	• Governance and funding proposals to support the delivery of the 2018-23 strategy were approved by the Joint Committee in June 2018.
	• Implement appropriate funding models to support the delivery of new and existing services	G	• 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	• 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	G	• 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.
	• Develop a risk model for evaluating new business opportunities to assess their impact on internal resources and/or existing customers	W	• 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.

	• Continue to implement technology solutions which increase efficiency, support agile working and offer scalability for business growth	G	• 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	• 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	G	• 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.
	• 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	G	• 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.
	• 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	G	• 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.

	• Continue to market Scotland Excel through traditional and social media, targeted communications activity and political engagement to support new business opportunities	G	• 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.
	• Identify opportunities arising for staff development through new business opportunities, fostering an understanding of commercial and entrepreneurial approaches across the organisation	G	• 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	• 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	G	• 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.
	• 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	G	• 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.
	• Design a model for providing procurement support to SEEMiS in line with the partnership agreement	G	• 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	• Number of contracts delivered v plan[1] • Value of contract portfolio v target	• 31 contracts delivered v 31 targeted • £1.02bn value v £1.4bn target
Our expertise leads continuous improvement in commercial performance	• Number of PCIP assessments delivered v plan • Number of Scotland Excel Academy courses v plan[2]	• 25 assessments delivered v 22 targeted • 49 courses delivered v 40 targeted
Our services facilitate the delivery of national and local policy priorities	• Tonnes of waste diverted from landfill through Scotland Excel contracts • Number of Scottish suppliers & percentage SMEs	• 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	• Number of community benefits realised to date	• 629 jobs • 254 apprenticeships • 165 work placements • 61,313 hours work experience • 5,761 hours volunteering/mentoring • £902k value of other initiatives
Our insight and knowledge underpin innovative solutions for our customers	• Number of business change initiatives delivered v plan	• 3 initiatives delivered v 6 targeted
Our activities are recognised as leading the way in public procurement	• Media coverage v target • Number of speaking engagements v target	• 68 media items published v 60 targeted • 17 speaking engagements v 12 targeted
Our customers receive a measurable return on investment through savings	• Percentage savings achieved across the portfolio v target[3] • Savings achieved in the last quarter	• 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	• Customer satisfaction scores v target[4]	• 80% of respondents

Report issued: May 2019

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[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)