

## **Scotland Excel**

**To: Joint Committee**

**On: 18 June 2021**

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

### **Annual Procurement Report**

#### **1. Introduction**

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

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

The annual procurement report must be published as soon as reasonably practicable after the end of the financial year. Scotland Excel's 4th annual procurement report to be published will be based on the 2020/21 financial year (for Scotland Excel this is 1st April 2020– 31st March 2021).

#### **2. Annual Report on Procurement in Scotland**

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

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

Based upon experience of reports published by contracting authorities in previous years, annual procurement reports are expected to be published no later than five months following the end of the authority's financial year. For Scotland Excel this

means the its annual procurement report for the 2020/21 financial year will be published no later than the end of August 2021.

### **3. Legislative Requirements**

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

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

### **4. Scotland Excel's Annual Procurement Report**

The report that Scotland Excel has prepared in order to meet the requirements of the Procurement Reform (Scotland) Act 2014 is given at Annex A.

### **5. Conclusion/Recommendation**

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

**Scotland Excel  
Annual Procurement Report  
(1 Apr 2020 – 31 March 2021)**

June 2021

# Contents

Introduction

Section 1: Summary of Regulated Procurements Completed

Section 2: Review of Regulated Procurement Compliance

Section 3: Community Benefits and Fair Work Practices

Section 4: Supported Business Summary

Section 5: Future Regulated Procurements Summary

Section 6: Other content for consideration

Appendix 1: Procurements Completed

Appendix 2: Governance (Procurement Process) Gateways

Appendix 3: Performance against our Strategy

Appendix 4: Planned Procurement

# Scotland Excel Annual Procurement Report 2020/21

## Introduction

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

Our contract portfolio, the value of which is c £2bn, supports the delivery of social care, construction, roads, transport, environment, corporate, education and ICT services. A strategic approach ensures contracts are designed to encourage innovation, facilitate policy, support local economies and generate social value for communities.

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

This annual procurement report will review the latest Procurement Strategy published by Scotland Excel 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 73 framework agreements. These frameworks are aligned to Councils' requirements and are established on their behalf. Appendix 1- Part 1 provides a high-level summary of the regulated procurements Scotland Excel has completed between 1 Apr 2020 and 31 March 2021. As required Appendix 1 includes:

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

In addition, Appendix 1 – Part 2 shows suppliers appointed (in the period 1 April 2020 to 31 March 2021) to the dynamic purchasing system (DPS) for the Treatment and Disposal of Recyclable and Residual Waste. During 2020/21 there were no suppliers appointed to the DPS for Bikeability Scotland Training Providers.

## **Section 2 Review of Regulated Procurement Compliance**

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

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

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

These Governance Gateways are designed to accommodate Regulated Procurements as defined by the Act.

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

procurement exercise.

Scotland Excel has reviewed the commodity strategy template to incorporate best practice. 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 2020/21 is given at Appendix 3.

### **Section 3 – Community Benefits and Fair Work Practices 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 incorporates 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 addresses the requirements of the statutory guidance made under the Procurement Reform (Scotland) Act 2014, and supports the ongoing drive to deliver sustainable procurement.

Community benefits information is collected from suppliers on a six-monthly basis. Scotland Excel’s process requires suppliers who receive spend in excess of £50,000 over the preceding two quarters to produce a detailed breakdown of the community benefits they provide. The information provided for the period 1st April 20 – 31 March 2021 has been collated and is as follows:

|                                   |          |
|-----------------------------------|----------|
| No. of Apprentices                | 26       |
| No. of New Jobs                   | 340      |
| No. of Work Placements            | 47       |
| Hours of Volunteering             | 608      |
| Hours of Work Experience          | 19       |
| Value of other Community Benefits | £858,590 |

This return is vital for the reporting of social and environmental benefits resulting from the procurement activity conducted by Scotland Excel. Our methodology provides a platform for suppliers to demonstrate the commitment they make at the tender stage and to realise their full economic potential. 'Other Community Benefits' encompass a range of benefits including donations and sponsorships of various clubs and community organisations. Even in the light of the Covid 19 pandemic our community benefit return results continue to be positive and demonstrate Scotland Excel's commitment to maximising community benefits from frameworks for works, goods and services. This approach evidences fulfilment of community benefits and recognises community benefits should improve the economic, social or environmental wellbeing of specific local authority areas.

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

With regard to Fair Work Practices (including the Living Wage) Scotland Excel commenced formal consideration within Tenders in early 2015. Since this time the respective position on bidders' work practices has been outlined within Executive Sub Committee Contracts for Approval Reports. Overall, of the 1051 suppliers appointed since formal consideration, 899 (85%) notified that they pay the Living Wage. For frameworks awarded during 2020/21 190 (91%) of suppliers appointed notified that they pay the living wage.

Scotland Excel continue to ensure transparency within the tender process and focus on aspects of fair work practices deemed relevant for each framework. Scotland Excel continue to monitor and encourage the implementation of fair working practices and to work closely with suppliers to review their progress in this area

#### **Section 4 – Supported Businesses Summary**

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

Supported businesses are defined as: *“an economic operator whose main aim is the social and professional integration of disabled or disadvantaged persons where at least 30% of the employees are disabled or disadvantaged”*. Contracts may be reserved for those businesses meeting these criteria.

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

Within the portfolio of contracts reviewed in 2020/21 no contracts were reserved for supported businesses in 2020/21 However in line with our sustainable procurement duty and procurement strategy all procurement exercises undertake a sustainability assessment. Due diligence in this way means evaluations are conducted to determine ways in which sustainability, including the use of supported businesses can be



maximised.

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

A number of framework suppliers have partnership relationships with supported businesses.

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

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

## **Section 5 – Future Regulated Procurements Summary**

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

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

Scotland Excel has fifty-nine regulated procurements due for renewal (or subject to contract extension) over the next two financial years. In addition, Scotland Excel plans to complete regulated procurements for six new contract areas in financial year 2021/22. Details of these anticipated contract requirements are shown in Appendix 4.

## **Section 6 – Other Content for Consideration**

At Scotland Excel, we are leaders of change. Over the past thirteen 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.

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 matters relating to public procurement and provide procurement support for a range of national sector initiatives.

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

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

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

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

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

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

Investors in People (IIP) - IIP is a UK government initiative, providing a best practice people management standard, and is regarded as an indication that Scotland Excel is a great employer, an outperforming place to work and has a clear commitment to sustainability.

Chartered Management Institute Approved Centre- Scotland Excel is an approved centre for the delivery and assessment of CMI leadership and management qualifications.

Living Wage - Scotland Excel is proud to be a Living Wage employer. Living wage is a voluntary hourly rate of £9.50 an hour (2020/21) set independently and updated annually, calculated according to the basic cost of living in the UK.

Appendix 1  
Procurements Completed

## Procurements completed (by start date) 01 Apr 2020 - 31 Mar 2021

| Award Date | Short Contract Title | Total Contract Value | Contract Start Date | Contract End Date | Supplier Name  | Schedule Number |
|------------|----------------------|----------------------|---------------------|-------------------|--|-----------------|
| 06/12/19   | Care & Support       | £560,000,000         | 01/04/20            | 31/03/24          | 1st Home Care Ltd.   | 1318            |
|            |                      |                      |                     |                   | Aberdeen Association of Social Services (trading As Vsa)                       | 1318            |
|            |                      |                      |                     |                   | Able Health Care Scotland Ltd  | 1318            |
|            |                      |                      |                     |                   | Absolute Recruitment (UK) Limited T/a Ablecare@home                            | 1318            |
|            |                      |                      |                     |                   | Acasa Care Limited   | 1318            |
|            |                      |                      |                     |                   | Action in Mind   | 1318            |
|            |                      |                      |                     |                   | Active Care (Ayrshire) Limited   | 1318            |
|            |                      |                      |                     |                   | Ailsa Care Services Limited  | 1318            |
|            |                      |                      |                     |                   | Allied Health-services Limited T/a Allied Healthcare                           | 1318            |
|            |                      |                      |                     |                   | Angela Magee T/a Visiting Angelz   | 1318            |
|            |                      |                      |                     |                   | Ark Housing Association Ltd  | 1318            |
|            |                      |                      |                     |                   | Aspire Housing & Personal Development Services Limited                         | 1318            |
|            |                      |                      |                     |                   | Balmoral Homecare Ltd  | 1318            |
|            |                      |                      |                     |                   | Blackwood Homes and Care   | 1318            |
|            |                      |                      |                     |                   | British Red Cross Society  | 1318            |
|            |                      |                      |                     |                   | Brothers of Charity Services (scotland)  | 1318            |
|            |                      |                      |                     |                   | Caledonia Social Care Limited  | 1318            |
|            |                      |                      |                     |                   | Caledonian Care Consultants Ltd T/a Bluebird Care (Dunbartonshire)             | 1318            |
|            |                      |                      |                     |                   | Call-in Homecare Limited   | 1318            |
|            |                      |                      |                     |                   | Capability Scotland  | 1318            |
|            |                      |                      |                     |                   | Carescot Limited T/a Home Instead Senior Care Glasgow North                    | 1318            |
|            |                      |                      |                     |                   | Caring Hearts Limited  | 1318            |
|            |                      |                      |                     |                   | Carr Gomm  | 1318            |
|            |                      |                      |                     |                   | C-change Scotland  | 1318            |
|            |                      |                      |                     |                   | Clyde Healthcare Limited   | 1318            |
|            |                      |                      |                     |                   | Community Integrated Care  | 1318            |
|            |                      |                      |                     |                   | Cornerstone Community Care   | 1318            |
|            |                      |                      |                     |                   | Crossreach (the Operating Name for The Church of Scotland Social Care Council) | 1318            |
|            |                      |                      |                     |                   | Crossroads Caring Scotland   | 1318            |
|            |                      |                      |                     |                   | Deafblind Scotland   | 1318            |
|            |                      |                      |                     |                   | Delight Supported Living Ltd   | 1318            |
|            |                      |                      |                     |                   | Enable Scotland (leading The Way)  | 1318            |
|            |                      |                      |                     |                   | Extended Personal Care Limited   | 1318            |
|            |                      |                      |                     |                   | Flourish Home Support Services Ltd   | 1318            |
|            |                      |                      |                     |                   | Glasgow Association for Mental Health  | 1318            |
|            |                      |                      |                     |                   | Glasgow Homecare Ltd T/a Home Instead Senior Care Glasgow South                | 1318            |
|            |                      |                      |                     |                   | Hamill Homecare Limited  | 1318            |
|            |                      |                      |                     |                   | Hazelhead Home Care Limited  | 1318            |
|            |                      |                      |                     |                   | Home Is Best Ltd   | 1318            |
|            |                      |                      |                     |                   | Hrm Homecare Services Ltd.   | 1318            |
|            |                      |                      |                     |                   | Ikl Care (a Partnership)   | 1318            |
|            |                      |                      |                     |                   | Independent Clinical Services Limited T/a Scottish Nursing Guild               | 1318            |
|            |                      |                      |                     |                   | Inspire (partnership Through Life) Ltd.  | 1318            |
|            |                      |                      |                     |                   | Invercare Services Ltd   | 1318            |
|            |                      |                      |                     |                   | Ion Care and Support Services Limited  | 1318            |
|            |                      |                      |                     |                   | Key Housing Association Limited  | 1318            |
|            |                      |                      |                     |                   | Kingdom Support and Care Cic T/a Kingdom Housing Association                   | 1318            |
|            |                      |                      |                     |                   | Lothian Trading Services Limited   | 1318            |
|            |                      |                      |                     |                   | Mears Care (scotland) Limited  | 1318            |
|            |                      |                      |                     |                   | Montana Home Care Ltd.   | 1318            |
|            |                      |                      |                     |                   | My Care (Grampian) Limited   | 1318            |
|            |                      |                      |                     |                   | National Autistic Society (the)  | 1318            |
|            |                      |                      |                     |                   | National Schizophrenia Fellowship (scotland) T/a Support                       | 1318            |

|          |                          |              |          |          |  |      |
|----------|--------------------------|--------------|----------|----------|--|------|
|          |                          |              |          |          | in Mind Scotland   |      |
|          |                          |              |          |          | Neighbourhood Networks in Scotland Limited                         | 1318 |
|          |                          |              |          |          | Penumbra   | 1318 |
|          |                          |              |          |          | Plus (forth Valley) Ltd  | 1318 |
|          |                          |              |          |          | Potters Health Care Limited  | 1318 |
|          |                          |              |          |          | Rainbow Services (UK) Ltd  | 1318 |
|          |                          |              |          |          | Ramh   | 1318 |
|          |                          |              |          |          | Real Life Options  | 1318 |
|          |                          |              |          |          | Sacro  | 1318 |
|          |                          |              |          |          | Salvation Army Trustee Company (the) T/a The Salvation Army        | 1318 |
|          |                          |              |          |          | Scottish Association for Mental Health                             | 1318 |
|          |                          |              |          |          | Scottish Autism  | 1318 |
|          |                          |              |          |          | Scrt Limited T/a Social Care Recruitment and Training              | 1318 |
|          |                          |              |          |          | Sense Scotland   | 1318 |
|          |                          |              |          |          | Srs Care Solutions Limited   | 1318 |
|          |                          |              |          |          | Step Up (housing, Employability & Community Support Services) Ltd. | 1318 |
|          |                          |              |          |          | Sue Ryder  | 1318 |
|          |                          |              |          |          | T&i Professional Services Limited                                  | 1318 |
|          |                          |              |          |          | The Action Group   | 1318 |
|          |                          |              |          |          | The Jon Fleming Group Limited                                      | 1318 |
|          |                          |              |          |          | The Mungo Foundation   | 1318 |
|          |                          |              |          |          | Thera (scotland)   | 1318 |
|          |                          |              |          |          | Time 2 Help Ltd.   | 1318 |
|          |                          |              |          |          | Trust Housing Association Limited                                  | 1318 |
|          |                          |              |          |          | Voyage 1 Ltd t/a Voyage Care                                       | 1318 |
|          |                          |              |          |          | With You Limited   | 1318 |
| 28/02/20 | Electrical Materials     | £80,000,000  | 01/04/20 | 31/03/24 | Bemco  | 0919 |
|          |                          |              |          |          | City Electrical Factors Ltd  | 0919 |
|          |                          |              |          |          | Cleveland Cable Company Ltd  | 0919 |
|          |                          |              |          |          | Edmundson Electrical Ltd   | 0919 |
|          |                          |              |          |          | Grafton Merchanting GB Ltd   | 0919 |
|          |                          |              |          |          | Holland House Electrical Company Ltd                               | 0919 |
|          |                          |              |          |          | R. & M. Distribution Limited                                       | 0919 |
|          |                          |              |          |          | Rexel UK Ltd   | 0919 |
|          |                          |              |          |          | Sm Electrical Supplies Ltd   | 0919 |
|          |                          |              |          |          | Stearn Electric Company Limited                                    | 0919 |
|          |                          |              |          |          | Yesss (a) Electrical Ltd   | 0919 |
| 30/01/20 | Fresh Fruit & Veg        | £24,000,000  | 01/04/20 | 31/03/24 | G Carruthers & Sons LTD  | 1019 |
|          |                          |              |          |          | George Anderson & Sons   | 1019 |
|          |                          |              |          |          | McLays Ltd   | 1019 |
|          |                          |              |          |          | Swansons Fruit Company Limited                                     | 1019 |
|          |                          |              |          |          | T.p.s. Fruit & Vegetables Limited                                  | 1019 |
|          |                          |              |          |          | Total Produce Limited  | 1019 |
| 07/02/20 | Secure Care              | £70,000,000  | 01/04/20 | 31/03/24 | Good Shepherd Centre   | 0219 |
|          |                          |              |          |          | Kibble Education & Care Centre                                     | 0219 |
|          |                          |              |          |          | Rossie Young Peoples Trust (Rossie Secure Accommodation Services)  | 0219 |
|          |                          |              |          |          | St Mary's Kenmure  | 0219 |
| 21/02/20 | Waste Disposal Equipment | £5,000,000   | 01/04/20 | 31/03/24 | Bergmann Direct Ltd  | 1419 |
|          |                          |              |          |          | Blue Machinery (scotland)  | 1419 |
|          |                          |              |          |          | Ck International   | 1419 |
|          |                          |              |          |          | Forth Skip Repair and Refurbishers Ltd                             | 1419 |
|          |                          |              |          |          | Gradeall International   | 1419 |
|          |                          |              |          |          | Ken Mills Engineering Ltd  | 1419 |
|          |                          |              |          |          | Reconomy (UK) Ltd  | 1419 |
|          |                          |              |          |          | Skip Units Ltd   | 1419 |
| 28/02/20 | Groceries & Provisions   | £120,000,000 | 01/05/20 | 30/04/24 | Adamsons Drinks Ltd  | 1219 |

|          |                                    |              |          |          |  |      |
|----------|------------------------------------|--------------|----------|----------|--|------|
|          |                                    |              |          |          | Bestway UK Holdco Limited                        | 1219 |
|          |                                    |              |          |          | Bfs Group Ltd (T/a Bidvest Catering Supplies)    | 1219 |
|          |                                    |              |          |          | Brake Bros Ltd                                   | 1219 |
|          |                                    |              |          |          | Davidsons Cash and Carry Limited                 | 1219 |
|          |                                    |              |          |          | Gsr Distributions Ltd                            | 1219 |
|          |                                    |              |          |          | William Yule And Son Limited                     | 1219 |
| 19/06/20 | Catering Sundries                  | £16,000,000  | 01/08/20 | 31/07/24 | Alliance Disposables Ltd                         | 1919 |
|          |                                    |              |          |          | Bfs Group Ltd (T/a Bidvest Catering Supplies)    | 1919 |
|          |                                    |              |          |          | Brake Bros Ltd                                   | 1919 |
|          |                                    |              |          |          | Bunzl UK Limited T/A Bunzl Catering Supplies     | 1919 |
|          |                                    |              |          |          | Bunzl UK Ltd T/A Lockhart Catering               | 1919 |
|          |                                    |              |          |          | GMC Corsehill                                    | 1919 |
|          |                                    |              |          |          | Instock Disposables                              | 1919 |
|          |                                    |              |          |          | Nisbets Plc                                      | 1919 |
|          |                                    |              |          |          | Unico Ltd  | 1919 |
| 15/05/20 | Demolition                         | £72,000,000  | 01/08/20 | 31/07/24 | Bardem Ltd                                       | 1119 |
|          |                                    |              |          |          | Burnfield Builders & Demolishers Ltd             | 1119 |
|          |                                    |              |          |          | Caskie Ltd                                       | 1119 |
|          |                                    |              |          |          | Central Demolition Ltd                           | 1119 |
|          |                                    |              |          |          | Chris Wright & Sons Ltd                          | 1119 |
|          |                                    |              |          |          | Cnc Group Holdings Limited T/a The Coleman Group | 1119 |
|          |                                    |              |          |          | Daltons Demolition Ltd                           | 1119 |
|          |                                    |              |          |          | Damada Asbestos Removals Ltd t/a Damada Group    | 1119 |
|          |                                    |              |          |          | David Morton (Larbert) Ltd                       | 1119 |
|          |                                    |              |          |          | David Smith Contractors Ltd                      | 1119 |
|          |                                    |              |          |          | Dem-master Demolition Ltd.                       | 1119 |
|          |                                    |              |          |          | Dundee Plant Company Limited                     | 1119 |
|          |                                    |              |          |          | Gcm Services Scotland Ltd                        | 1119 |
|          |                                    |              |          |          | George Beattie & Sons Ltd                        | 1119 |
|          |                                    |              |          |          | Gowrie Contracts (Scotland) Ltd                  | 1119 |
|          |                                    |              |          |          | Jch Plant Hire Ltd                               | 1119 |
|          |                                    |              |          |          | JCJ (Demolition & Construction) Ltd              | 1119 |
|          |                                    |              |          |          | John Graham (metals) Limited                     | 1119 |
|          |                                    |              |          |          | Macwilliam Demolition Ltd                        | 1119 |
|          |                                    |              |          |          | Mgr Industrial Services Limited                  | 1119 |
|          |                                    |              |          |          | Reigart Contracts Ltd                            | 1119 |
|          |                                    |              |          |          | Safedem Ltd                                      | 1119 |
|          |                                    |              |          |          | Technical Demolition Services Limited            | 1119 |
|          |                                    |              |          |          | William Goodfellow (Contractors) Ltd             | 1119 |
|          |                                    |              |          |          | William Munro Construction (Highland) Ltd        | 1119 |
| 28/08/20 | Domestic Furniture and Furnishings | £105,000,000 | 01/02/21 | 31/01/25 | CF Services Ltd                                  | 2019 |
|          |                                    |              |          |          | Community Resources Network Scotland             | 2019 |
|          |                                    |              |          |          | Gavhas Ltd                                       | 2019 |
|          |                                    |              |          |          | New Two Ltd                                      | 2019 |
|          |                                    |              |          |          | Oscorp Inverclyde Limited                        | 2019 |
|          |                                    |              |          |          | Spruce Carpets                                   | 2019 |
|          |                                    |              |          |          | The Furnishing Service Ltd                       | 2019 |
| 27/11/20 | Bitumen Products                   | £56,000,000  | 01/03/21 | 28/02/25 | Colas Ltd  | 0320 |
|          |                                    |              |          |          | Diatech Scotland Ltd                             | 0320 |
|          |                                    |              |          |          | Instarmac Group Plc                              | 0320 |
|          |                                    |              |          |          | Jobling Purser                                   | 0320 |
|          |                                    |              |          |          | Meon Limited                                     | 0320 |
|          |                                    |              |          |          | Nynas UK AB                                      | 0320 |
|          |                                    |              |          |          | Red Stag Materials Limited                       | 0320 |
|          |                                    |              |          |          | Tarmac Building Products Limited                 | 0320 |
|          |                                    |              |          |          | Viatec UK Ltd                                    | 0320 |
| 29/01/21 | Social Care Case                   | £28,000,000  | 12/03/21 | 14/02/25 | Advanced Health and Care Limited                 | 1420 |

|          |                         |             |          |          |  |   |      |
|----------|-------------------------|-------------|----------|----------|--|---|------|
|          | Management              |             |          |          |  | Azeus UK Limited                                | 1420 |
|          |                         |             |          |          |  | Liquidlogic Limited                             | 1420 |
|          |                         |             |          |          |  | Olm Systems Limited                             | 1420 |
|          |                         |             |          |          |  | Servelec Social Care Limited                    | 1420 |
| 18/12/20 | Engineering Consultancy | £68,500,000 | 18/03/21 | 17/03/25 |  | Aecom Ltd                                       | 0820 |
|          |                         |             |          |          |  | Aird Geomatics Limited                          | 0820 |
|          |                         |             |          |          |  | Amey OW Ltd                                     | 0820 |
|          |                         |             |          |          |  | Arcadis Consulting (UK) Ltd                     | 0820 |
|          |                         |             |          |          |  | Atkins Ltd                                      | 0820 |
|          |                         |             |          |          |  | Capita Property and Infrastructure Ltd          | 0820 |
|          |                         |             |          |          |  | Currie And Brown UK Limited                     | 0820 |
|          |                         |             |          |          |  | Fairhurst                                       | 0820 |
|          |                         |             |          |          |  | Gardiner And Theobald Llp                       | 0820 |
|          |                         |             |          |          |  | Gavin And Doherty Geosolution (UK) Limited      | 0820 |
|          |                         |             |          |          |  | Haskoningdhv UK Limited                         | 0820 |
|          |                         |             |          |          |  | Ibi Group (UK) Limited                          | 0820 |
|          |                         |             |          |          |  | Ikm Consulting Ltd                              | 0820 |
|          |                         |             |          |          |  | Ironside Farrar Limited                         | 0820 |
|          |                         |             |          |          |  | Jacobs UK Ltd                                   | 0820 |
|          |                         |             |          |          |  | Jeremy Benn Associates Ltd (t/a JBA Consulting) | 0820 |
|          |                         |             |          |          |  | Local Transport Projects Ltd                    | 0820 |
|          |                         |             |          |          |  | Mhb Consultants Ltd                             | 0820 |
|          |                         |             |          |          |  | Mott Macdonald Ltd                              | 0820 |
|          |                         |             |          |          |  | Pell Frischman Consultants Limited              | 0820 |
|          |                         |             |          |          |  | Pick Everard                                    | 0820 |
|          |                         |             |          |          |  | RPS Consulting Services Ltd                     | 0820 |
|          |                         |             |          |          |  | Rsk Environment Ltd                             | 0820 |
|          |                         |             |          |          |  | SAC Commercial Ltd                              | 0820 |
|          |                         |             |          |          |  | Stantec UK Limited                              | 0820 |
|          |                         |             |          |          |  | Sweco UK Ltd                                    | 0820 |
|          |                         |             |          |          |  | Systra Ltd                                      | 0820 |
|          |                         |             |          |          |  | Turner and Townsend Project Management Ltd      | 0820 |
|          |                         |             |          |          |  | Wallace Stone Llp                               | 0820 |
|          |                         |             |          |          |  | Waterman Infrastructure and Environment Limited | 0820 |
|          |                         |             |          |          |  | WSP UK Ltd                                      | 0820 |

Appendix 1 – Part 2  
 Appointments to DPS  
 for

Treatment and Disposal of Recyclable and Residual Waste

**New Entrants**

| <b>Service Provider Name</b>           | <b>Lots Approved</b>           | <b>Effective Date</b>        |
|--|--------------------------------|------------------------------|
| MGA Woodfuels Limited                  | Lot 8                          | 27 <sup>th</sup> August 2020 |
| Scottish Water Horizons Limited        | Lot 18                         | 15th September 2020          |
| Salvation Army Trading Company Limited | Lot 9                          | 27th September 2020          |
| Eagle Recycling (UK) Limited           | Lot 13                         | 16th February 2021           |
| SOEX UK Ltd                            | Lot 9                          | 15th March 2021              |
| Viridor Dunbar Waste Services Limited  | Lots 4,5,7,8,10,11,16,19,21 22 | 1st April 2021               |
| MKD32 Ltd                              | Lot 3                          | 8th April 2021               |

**New Offers**

| <b>Service Provider Name</b>     | <b>Additional Lots Approved</b> | <b>Effective Date</b> |
|----------------------------------|---------------------------------|-----------------------|
| Hamilton Waste Recycling Limited | Lot 1                           | 14 February 2020      |
| Brewster Brothers Ltd            | Lots 3,10,17,22                 | 26 January 2021       |
| Hamilton Waste Recycling Limited | Lot 3                           | 21 April 2021         |



## Appendix 2

### Governance (Procurement Process) Gateways

| <b>Contract Steering Group – Process Gateways</b> |   |
|---|---|
|   | <b>Process Stage</b>  |
| 1   | Contract Initiation   |
| 2   | Market Research and Analysis  |
| 3   | Communicate Strategy Pack to UIG for Review                                     |
| <b>4</b>  | <b>Strategy Approved</b>  |
|   | 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   |
| <b>6 -17</b>                                      | <b>PQQ Approved (sub -stages subject to use of Restricted Process)</b>          |
| <b>18</b>   | <b>Tender Documents Approved</b>  |
|   | 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  |
| <b>24</b>   | <b>Tender Evaluation Approved (includes sub stages 24a-24e)</b>                 |
| 25  | Prepare Sub Executive Committee Report  |
| 26  | PTN Approved  |
| 27  | Conduct PTN   |
| <b>28</b>   | <b>Executive Sub-Committee Report Approved</b>                                  |
| 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   |
| <b>40</b>   | <b>Contract Management Annual Review</b>  |
|   | 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 2020/21

## Review of Regulated Procurement - Performance against our strategy, operating plan and objectives for 2020/21

Progress reports are produced quarterly to track Scotland Excel's activity 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 has been revised to include symbols to indicate projects or activities which have not yet started, and projects or activities which have been completed:

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






The following report provides an update on activities undertaken during financial year to 31 March 2021. 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. (Due to continuing uncertainty in relation to Covid-19 and Brexit, reporting against key performance indicators (KPIs) is currently on hold pending a review of appropriate measures.









# Operating Plan

Q4 Progress Report (2021)

## Goal 1: Shaping the delivery of innovative public services





| Strategic Objective  | Commitment  | RAG status  | Progress summary  |
|--|---|---|---|
| 1.1 Deliver a programme of collaborative procurement to support early intervention and the delivery of public services | <ul style="list-style-type: none"> <li>Continue to engage directly with local authority services on the collaborative procurement opportunities pipeline and identify opportunities to lead and/or participate in national cross-sector opportunities and initiatives with partners in health, further and higher education, and central government.</li> </ul> |    | <ul style="list-style-type: none"> <li>Scotland Excel held a Commercial User Intelligence Group (UIG) steering group meeting in February to inform the direction of the procurement pipeline. Regular engagement is taking place with other centres of expertise to share best practice for Personal Protective Equipment (PPE) and explore other opportunities.</li> </ul>       |
|  | <ul style="list-style-type: none"> <li>Continue to develop and deliver a contract and supplier management (CSM) programme which monitors and enhances the performance of Scotland Excel contracts, incorporating new environmental performance measurements</li> </ul>  |    | <ul style="list-style-type: none"> <li>Regular engagement continues to take place with key strategic suppliers, particularly in relation to frameworks and commodities affected by the Covid-19 pandemic and Brexit. Scotland Excel's formal Contract and Supplier Management (CSM) programme will be reinstated later in the year.</li> </ul>                                    |
|  | <ul style="list-style-type: none"> <li>Open the adult care and support flexible framework to allow new providers to join, ensuring a diverse range of services and providers are available to meet the varying needs of people across the country, and promote choice for people who need support.</li> </ul>   |    | <ul style="list-style-type: none"> <li>Following the re-opening of Scotland Excel's adult care and support flexible framework, 40 new providers offering over 100 new services have been accepted on to the framework. From April, a total of 110 providers will offer more than 400 different services through the framework.</li> </ul>   |
| 1.2 Deliver programmes which lead and develop professional, organisational and commercial capability                   | <ul style="list-style-type: none"> <li>Develop a portfolio of accredited and non-accredited Academy programmes based on member and wider public sector requirements whilst progressing other strategic areas such as apprenticeships and becoming a credit rating body.</li> </ul>  |  | <ul style="list-style-type: none"> <li>The Scotland Excel Academy is currently delivering 8 cohorts of accredited programmes across a range of disciplines. A further 7 programmes are scheduled for 2021 and, following the success of Stay Connected, a new phase of online courses and workshops is being planned in partnership with local authority stakeholders.</li> </ul> |
|  | <ul style="list-style-type: none"> <li>Deliver sector and local initiatives which support Scottish Government national policy objectives, such as flexible and affordable solutions.</li> </ul>   |  | <ul style="list-style-type: none"> <li>A team has been established to develop and deliver Scotland Excel's Annual Conference 2021. This will take place as online event in June, with a programme that aims to challenge sector norms/</li> </ul>   |



|  |   |   |   |
|--|---|---|---|
|  |   |   | practice in key policy areas, share learning, generate new ideas, and facilitate engagement with key procurement stakeholders.  |
|  | <ul style="list-style-type: none"> <li>Continue to deliver chargeable consultancy and transformation programmes, responding to any requests for these types of services and building the Scotland Excel knowledge bank to retain the intellectual property of improvement methodologies and resources within the local government sector</li> </ul> |    | <ul style="list-style-type: none"> <li>Scotland Excel is currently delivering a number of chargeable projects and programmes including hosted procurement services for Dumfries and Galloway Council, Glasgow Life and City Property. All projects and programmes are progressing well, and a positive pipeline for new projects is in place. The transformation programme for East Renfrewshire Council has been extended for another year. Recommendations have been presented for the Tayside transformation programme which draws to a close in June 2021.</li> </ul> |
|  | <ul style="list-style-type: none"> <li>Engage with members, suppliers and providers to understand the impact of Covid-19 and BREXIT to support the delivery of frameworks, services and knowledge to meet Local Authority and national objectives.</li> </ul>   |    | <ul style="list-style-type: none"> <li>A communication strategy has been developed to ensure that key stakeholders are kept informed with issues arising from Covid-19 and Brexit. An updated report on the impact on frameworks was published in February, and a presentation was delivered to the Chief Executive Officers Management Group (CEOMG) in March. Scotland Excel's Project and Account Managers are actively supporting members with Covid-19 and Brexit related recovery programmes.</li> </ul>  |
|  | <ul style="list-style-type: none"> <li>Drive the next generation development of the National Care Home Contract (NCHC) and continue negotiations with providers on rates of return to enable implementation of the NCHC Cost Model © which supports the delivery of affordable and sustainable social care services.</li> </ul>                     |  | <ul style="list-style-type: none"> <li>The National Care Home Contract (NCHC) fee offer for 2021-22 has not yet been concluded as Scottish Care is seeking clarification from the Scottish Government on the impact of the NHS pay increase for the care sector. Scotland Excel is recruiting a dedicated manager for the NCHC contract to review and implement the recommendations of the Adult Care Review.</li> </ul>  |

|  |   |   |  |
|--|---|---|--|
| 1.3 Harness the potential of digital technology and data insight to support the delivery of public services  | <ul style="list-style-type: none"> <li>Continue to develop The Academy's online learning platform, to support engagement and learning, and to deliver national coaction events, video content and programmes.</li> </ul>  |  | <ul style="list-style-type: none"> <li>A video library of Stay Connected courses has been created in the Academy online platform to facilitate self-directed learning. Plans are underway to evolve the Stay Connected sessions into chargeable online workshops that will be delivered over 2-4 hours.</li> </ul>   |
|  | <ul style="list-style-type: none"> <li>Continue to provide ICT procurement services for the Digital Office for Scottish Local Government, engaging proactively with stakeholders to accelerate a collaborative approach to the adoption of digital technologies.</li> </ul> |  | <ul style="list-style-type: none"> <li>The framework for social care case management solutions, developed in partnership with the Digital Office and local authority stakeholders, was awarded in February. This framework will allow councils to streamline their internal systems and share appropriate information in the best interests of service users. The latest updates to the Scottish Government Digital Strategy have been embedded within Scotland Excel's ICT strategy to inform future digital procurement projects.</li> </ul> |
| 1.4 Use our insight and experience to shape policy and meet the challenges of future public service delivery | <ul style="list-style-type: none"> <li>Continue to work with the Scottish Government and other partners to support the development and/or delivery of national policy objectives across the SXL portfolio including guidance, tools and reporting.</li> </ul>               |  | <ul style="list-style-type: none"> <li>Scotland Excel is continuing to work with the Scottish Government and other partners across a range of policy areas including social care, climate change and community wealth-building. A new public affairs strategy and plan has been developed to support future engagement with the Scottish Government and/or other partner around these key themes.</li> </ul>   |









## Goal 2: Being sustainable in everything we do

| Strategic Objective   | Commitment  | RAG status  | Progress summary   |
|---|---|---|--|
| 2.1 Deliver positive and measurable social value through our contracts and services                                   | <ul style="list-style-type: none"> <li>Work with partners and secure care providers to support the implementation of the new National Standards and Pathways for Secure Care Centres.</li> </ul>  |    | <ul style="list-style-type: none"> <li>The new national standards have been built into secure care contracts. Discussions are ongoing with partners and providers in relation to the funding and implementation of the standards, and Scotland Excel is continuing to participate in the COSLA/Scottish Government Secure Care Group.</li> </ul>   |
|   | <ul style="list-style-type: none"> <li>Continue to monitor the proportion of Scotland Excel suppliers paying their staff the Real Living Wage and identify any opportunities to increase this</li> </ul>  |    | <ul style="list-style-type: none"> <li>More than 80% of suppliers have confirmed payment of the Living Wage, and commitments are monitored as part of ongoing contract management. Scotland Excel is working with the Scottish Government to review Fair Work practices in social care, and fee variations are now aligned to the national approach to increasing the Real Living Wage.</li> </ul>                                 |
|   | <ul style="list-style-type: none"> <li>Continue to embed community benefit models which enable councils to achieve direct benefits for their areas and the participation of supported businesses and the third sector within our supply chain</li> </ul>          |    | <ul style="list-style-type: none"> <li>Collection of community benefits data has resumed following a temporary suspension during the early part of the pandemic. Data is now available to the end of September 2020. Scotland Excel is refreshing its supported business strategy and, in May, will host a workshop with British Association of Supported Business (BASE) members to discuss future strategy and plans.</li> </ul> |
| 2.2 Deliver positive and measurable local economic impact through SME and third sector participation in our contracts | <ul style="list-style-type: none"> <li>Support the continued application of community wealth building including living wage Scotland Excel suppliers and work with partners including Scottish Government and the Supplier Development Programme (SDP)</li> </ul> |  | <ul style="list-style-type: none"> <li>The Scottish Government has funded a community wealth-building procurement project which is being delivered by Scotland Excel with four councils. The project explores a range of tools and approaches to identify opportunities for local suppliers as part of Scotland's 'Recovery and Restart' economic programme. Scotland Excel</li> </ul>   |




|  |   |   |  |
|--|---|---|--|
|  |   |   | took part in two Supplier Development Programme (SDP) webinars for Scottish SMEs during Q4.  |
| 2.3 Deliver positive and measurable environmental benefits through our contracts | <ul style="list-style-type: none"> <li>Continue to deliver and promote environmental sustainability goals including Scotland Excel and supplier carbon footprint and consider "best value" and 'whole life' costing within tender evaluations</li> </ul>  |  | <ul style="list-style-type: none"> <li>Tender documentation continues to include environmental considerations including, where appropriate, the weighting and scoring of emissions. Scotland Excel is engaging with Scottish Government on the second generation of the energy efficiency contractors (EEC) framework as an enabler of net zero 2045, and supported the development of a national Climate Change e-learning module which now forms part of the Scottish Government's Procurement Journey.</li> </ul> |
| 2.4 Lead and develop sustainable procurement knowledge and practice              | <ul style="list-style-type: none"> <li>Explore the development of progressive, sustainable learning pathways to support career development within the sector, co-chairing the Scottish Government professional practice and development framework, and work with educational partners and/or suppliers to establish workforce needs and promote the benefits of procurement as a career.</li> </ul> |  | <ul style="list-style-type: none"> <li>The Scotland Excel Academy is working with the Scottish Government's procurement directorate to signpost programmes within the national procurement development framework that are available through the Academy. While there has been limited opportunity to engage with schools and further education establishments during the pandemic, Scotland Excel continues to respond to requests for procurement career advice.</li> </ul>   |




## Goal 3: Placing people at the heart of our business

| Strategic Objective  | Commitment   | RAG status  | Progress summary  |
|--|--|---|---|
| 3.1 Ensure our customers continue to receive maximum value from our services | <ul style="list-style-type: none"> <li>Continue to deliver Scotland Excel's account management services to ensure and demonstrate value to members and support a positive customer experience</li> </ul>                                   |    | <ul style="list-style-type: none"> <li>Scotland Excel's Project and Account Managers continue to provide a wide range of support to council procurement teams including quarterly business reviews, change projects, and workshops. An internal project is underway to enhance the recording and management of information which demonstrates Scotland Excel's value to customers in a timely and robust manner.</li> </ul>                     |
|  | <ul style="list-style-type: none"> <li>Continue and refresh Scotland Excel's stakeholder engagement activity including understanding priorities and assessing satisfaction</li> </ul>  |    | <ul style="list-style-type: none"> <li>An updated stakeholder map for housing has been produced to support the work of the new build group. Plans to embed the use of stakeholder engagement and mapping tools across the organisation will be implemented during 2021-22.</li> </ul>   |
| 3.2 Engage stakeholders in the delivery of effective local solutions         | <ul style="list-style-type: none"> <li>Continue to engage directly with service users and the wider community, where appropriate, to ensure their needs are met and incorporated into the development of procurement strategies</li> </ul> |    | <ul style="list-style-type: none"> <li>Scotland Excel's community wealth-building services are generating significant interest among council members, and the outputs of these projects will be used to inform future contract strategies. Scotland Excel is also helping a number of councils to engage with their local early learning and childcare (ELC) providers as part of the national policy to expand childcare provision.</li> </ul> |
|  | <ul style="list-style-type: none"> <li>Continue to engage directly with partners to ensure that national social care contracts meet the needs of all care groups and align with national strategy</li> </ul>                               |  | <ul style="list-style-type: none"> <li>Scotland Excel is working with partners to consider the recommendations of the Independent Review of Adult Social Care, including the implications for individual contract areas as well as Scotland Excel's overall role in supporting local government.</li> </ul>   |
| 3.3 Represent the collective views of stakeholders at a national level       | <ul style="list-style-type: none"> <li>Continue to collect, review and represent the views of members, customers and communities at appropriate fora</li> </ul>  |  | <ul style="list-style-type: none"> <li>Scotland Excel is continuing to represent the local government sector within Scottish Government national initiatives including the Construction National Portfolio Forum, the Professional Practice</li> </ul>  |






|   |  |   |   |
|---|--|---|---|
|   |  |   | and Development Forum, and a short-life working group reviewing impact of the Sustainable Procurement Duty.   |
| 3.4 Implement policies which develop, empower, value and engage our workforce | <ul style="list-style-type: none"> <li>Continue to implement the Scotland Excel organisational development strategy, developing initiatives to inspire and develop staff, increase Scotland Excel's capability, and support succession planning</li> </ul> |  | <ul style="list-style-type: none"> <li>Scotland Excel has completed a workforce planning review to ensure it has the right structure in place to deliver future plans. This will be implemented in conjunction with staff over the coming months. Work is continuing to enhance all organisational development activity including ongoing engagement with Investors in People (IIP).</li> </ul> |

## Goal 4: Delivering sustainable and scalable growth

| Strategic Objective   | Commitment   | RAG status  | Progress summary   |
|---|--|---|--|
| 4.1 Implement a new governance model which supports scalable business growth              | <ul style="list-style-type: none"> <li>Promote the concept of Coaction to senior stakeholders and explore opportunities where creation, delivery and production of high-quality national cost effective learning is jointly undertaken</li> </ul>                          |    | <ul style="list-style-type: none"> <li>Following cancellation of regional workshops in 2020 due to the pandemic, Coaction 2021 is now being scheduled as an online event for later in the year. Coaction brings together key stakeholders from across the public sector to share expertise and collaborate on the development of targeted learning opportunities.</li> </ul>   |
|   | <ul style="list-style-type: none"> <li>Continue to implement appropriate funding routes through the delivery of new and existing services, monitoring income and providing regular reports to the joint committee whilst recognising the impact of the pandemic</li> </ul> |    | <ul style="list-style-type: none"> <li>Although income streams for the financial year 2020-21 were impacted by the pandemic, demand for chargeable projects and programmes has increased significantly during Q4. This has included a project for the Scottish Government to administer and validate applications from over 1000 providers in the independent and voluntary sector to enable £500 payments to be made to c.130,000 social care workers. Uptake of the new build framework is also gathering momentum, with income levels slightly higher than revised targets.</li> </ul>  |
| 4.2 Continue to maintain a robust business infrastructure to support our growth ambitions | <ul style="list-style-type: none"> <li>Continue to develop and support a robust working environment and infrastructure that includes the use of digital technology, agile working and emerging technology to benefit staff and customers</li> </ul>                        |  | <ul style="list-style-type: none"> <li>Scotland Excel's new cloud-based, Spend Data Repository (SDR) will be launched in July 2021. The system will streamline the capture and analysis of spend returns for Scotland Excel frameworks, and generate reports for staff and external customers. New agile working practices are being explored based on lessons learned during the pandemic, including voluntary blended home and office working for staff, and virtual stakeholder meetings. Scotland Excel's telephony service has been transferred to the MS Teams platform to support these initiatives, and cyber security and disaster</li> </ul> |

|   |  |   |  |
|---|--|---|--|
|   |  |   | recovery provision is being reviewed across the ICT infrastructure.  |
| 4.3 Use our knowledge and insight to identify new services and/or sectors which provide growth opportunities  | <ul style="list-style-type: none"> <li>• Research collaborative procurement and leading change solutions available in other public sector markets to identify potential business opportunities, reporting on the findings to inform future growth plans</li> </ul>   |    | <ul style="list-style-type: none"> <li>• A cross-organisational workshop to review and discuss a proposed competitor analysis model took place in March. Follow up meetings have been arranged to agree a way forward for implementing competitor analysis tools across the organisation.</li> </ul>   |
|   | <ul style="list-style-type: none"> <li>• Continue to grow and develop Scotland Excel's associate membership programme to maximise its commercial potential for the organisation including framework spend whilst providing demonstrable benefits for members</li> </ul>  |    | <ul style="list-style-type: none"> <li>• Seven new associate members were approved in Q4 with a total annual income of £2.9k. Scotland Excel is engaging with the 36 organisations that became temporary associate members during the pandemic, and four have since become full fee-paying associate members. In February and March, Scotland Excel hosted a webinar to promote the new build framework and associate membership to over 60 delegates from the housing sector, and attended five virtual events delivered by the Scottish Federation of Housing Associations (SFHA) and the Chartered Institute of Housing (CIH).</li> </ul> |
| 4.4 Explore opportunities to work with partners on the development and delivery of new business opportunities | <ul style="list-style-type: none"> <li>• Continue to market Scotland Excel through traditional and social media, targeted communications activity and political engagement to support new business opportunities and promote our knowledge and experience in support of policy and public affairs goals</li> </ul> |  | <ul style="list-style-type: none"> <li>• Development work has been completed on a new corporate website, and work is now underway to finalise and upload initial content. Other marketing and communications activity during Q4 included the development of a new public affairs strategy and plan, a multi-channel campaign for the new build framework, support for hosted and external events, press releases for new contracts, and a busy social media programme.</li> </ul>  |

|  |  |   |   |
|--|--|---|---|
|  | <ul style="list-style-type: none"> <li>• Explore new Scotland Excel partnership opportunities and continue to develop partnerships e.g. Crown Commercial Services (CCS) to ensure most effective delivery of Scotland Excel and customer objectives</li> </ul> |  | <ul style="list-style-type: none"> <li>• The partnership with Crown Commercial Services (CCS) continues to operate well, and a collaborative opportunity for electric vehicle charging points is being explored. Following associate membership approval in Q3, the Construction Scotland Innovation Centre (CSIC) participated in Scotland Excel's new build framework webinar as a part of new partnership for housing and construction.</li> </ul> |
|--|--|---|---|

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

Report issued: April 2021

## Appendix 4

### Planned Procurement to 31/03/2023

#### Frameworks due for renewal (or subject to contract extension) by 31 Mar 2023

| Short Contract Title                           | Schedule Number | End Date of Current Framework |
|--|-----------------|-------------------------------|
| Asbestos                                       | 2418            | 30/06/2021                    |
| Organic Waste                                  | 0816            | 30/06/2021                    |
| Education Materials                            | 0916            | 31/07/2021                    |
| New Build Residential                          | 1518            | 31/07/2021                    |
| Outdoor Play Equipment and Artificial Surfaces | 0215            | 31/07/2021                    |
| Street Lighting Materials                      | 2617            | 31/07/2021                    |
| Education And Office Furniture                 | 0216            | 31/08/2021                    |
| First Aid Materials                            | 1018            | 30/09/2021                    |
| Fresh Meat, Cooked Meats & Fresh Fish          | 0118            | 30/09/2021                    |
| Commercial Catering Equipment                  | 1118            | 31/10/2021                    |
| Energy Efficiency Contractors                  | 0913            | 31/10/2021                    |
| Tyres for Vehicles & Plant                     | 0417            | 31/10/2021                    |
| Vehicle & Plant Hire                           | 0217            | 31/10/2021                    |
| Recycle And Refuse Containers                  | 0117            | 02/11/2021                    |
| Bottled Gas                                    | 0817            | 05/11/2021                    |
| Laundry Equipment                              | 0917            | 05/11/2021                    |
| Personal Protective Equipment                  | 0416            | 30/11/2021                    |
| Pest Control Services                          | 1217            | 30/11/2021                    |
| Road Signage Materials                         | 1418            | 30/11/2021                    |
| Steeplejack Services                           | 1017            | 30/11/2021                    |
| Heavy Vehicles                                 | 0317            | 31/12/2021                    |
| Technology Enabled Care                        | 3117            | 31/12/2021                    |
| Repair of Catering Machines                    | 2117            | 07/01/2022                    |
| Swimming Pool Chemicals                        | 1517            | 07/01/2022                    |
| Water Coolers                                  | 1317            | 07/01/2022                    |
| Energy Advice                                  | 1718            | 13/01/2022                    |
| Hot Beverages                                  | 1618            | 13/01/2022                    |
| Library Books & Textbooks                      | 0617            | 31/01/2022                    |
| Digital Publications and Services              | 2517            | 31/01/2022                    |
| Power Tools                                    | 0218            | 16/02/2022                    |
| Trade Materials                                | 0717            | 16/02/2022                    |
| Grounds Maintenance Equipment                  | 0918            | 28/02/2022                    |
| Milk   | 1917            | 28/02/2022                    |
| Building & Timber                              | 0318            | 31/03/2022                    |
| Electrical Materials                           | 0919            | 31/03/2022                    |
| Frozen Foods                                   | 1016            | 31/03/2022                    |
| Secure Care                                    | 0219            | 31/03/2022                    |
| Fire Safety Products                           | 1617            | 15/04/2022                    |



|  |      |            |
|--|------|------------|
| Children's Residential                   | 0517 | 30/04/2022 |
| Cleaning Equipment                       | 1818 | 30/04/2022 |
| Groceries & Provisions                   | 1219 | 30/04/2022 |
| Vending Machines                         | 2118 | 30/04/2022 |
| Roadstone                                | 2817 | 30/06/2022 |
| Salt for Winter Maintenance              | 2917 | 30/06/2022 |
| Alcoholic Beverages                      | 0119 | 31/07/2022 |
| Catering Sundries                        | 1919 | 31/07/2022 |
| Demolition                               | 1119 | 31/07/2022 |
| Social Care Agency Workers               | 2017 | 31/07/2022 |
| Community Meals                          | 2018 | 31/08/2022 |
| Road Maintenance Materials               | 3017 | 31/08/2022 |
| Boiler Maintenance                       | 2217 | 13/09/2022 |
| Fresh Bread, Rolls & Bakery Products     | 0419 | 30/09/2022 |
| Washroom Solutions and Sanitary Products | 3217 | 30/09/2022 |
| Plumbing And Heating Materials           | 2318 | 30/11/2022 |
| Sherriff Officers                        | 0619 | 30/11/2022 |
| Janitorial Products                      | 1218 | 28/02/2023 |
| Light and Heavy Plant                    | 0818 | 28/02/2023 |
| Audio Visual                             | 0618 | 31/03/2023 |
| Fresh Fruit & Veg                        | 1019 | 31/03/2023 |

## New Contract Areas

| Contract Title                      | Forecast Delivery date |
|-------------------------------------|------------------------|
| Digital Telecare                    | April 2021             |
| Supply Teacher Booking System       | April 2021             |
| Waste Composition Analysis          | August 2021            |
| Electric Vehicle Charging Points    | October 2021           |
| Construction & Building Consultancy | January 2022           |
| Lift Maintenance                    | March 2022             |