

**Scotland Excel**  
**Annual Procurement Report**  
**(1 Apr 2019 – 31 March 2020)**

June 2020

# Contents

Introduction

Section 1: Summary of Regulated Procurements Completed

Section 2: Review of Regulated Procurement Compliance

Section 3: Community Benefits Summary

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 2019/20

## 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 now exceeds £1.5bn, supports the delivery of social care, construction, roads, transport, environment, corporate, education and ICT services. A strategic approach ensures contracts are designed to encourage innovation, facilitate policy, support local economies and generate social value for communities.

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

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

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

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

## Section 1 Summary of Regulated Procurements Completed

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

A regulated procurement is completed when the award notice is published or where the procurement process otherwise comes to an end. This includes contracts and framework agreements.

The principle of transparency requires an organisation to approach its public procurements in an open and inclusive manner. Scotland Excel has at present seventy-four live framework agreements. These frameworks are aligned to Councils' requirements and are established on their behalf. Appendix 1- Part 1 provides a high-level summary of the regulated procurements Scotland Excel has completed between 1 Apr 2019 and 31 March 2020. As required Appendix 1 includes:

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

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

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

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

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

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

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

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

Scotland Excel have 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 2019/20 is given at Appendix 3.

### **Section 3 – Community Benefits Summary**

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

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

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

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

No. of Apprentices	21
No. of New Jobs	192
No. of Work Placements	27
Hours of Volunteering	601
Hours of Work Experience	5879
Value of other Community Benefits	£560,090

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

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

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

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

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

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

Within the portfolio of contracts reviewed in 2019/20 no contracts were reserved for supported businesses in 2019/20 However in line with our sustainable procurement duty and procurement strategy all procurement exercises undertake a sustainability assessment. Due diligence in this way means evaluations are conducted to determine ways in which sustainability, including the use of supported businesses can be maximised.

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

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

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 forty-seven 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 2020/21. 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 twelve years, we have helped to raise the profile of procurement in local authorities by championing its potential to shape markets, support policy priorities and, ultimately, ensure the sustainable delivery of the services that every community needs.

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

Scotland Excel also offers an award-winning learning and development programme, and provides assessment, consultancy and improvement services to help councils transform their procurement capability. We represent the sector at a national level on all matters relating to public procurement and provide procurement support for a range of national sector initiatives including the Scottish Government’s Affordable Housing Supply Programme (AHSP).

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

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

## sustainable public services

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

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

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

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

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

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

Living Wage - Scotland Excel is proud to be a Living Wage employer. Living wage is a voluntary hourly rate of £9.30 (2019/20) an hour set independently and updated annually, calculated according to the basic cost of living in the UK.



Appendix 1  
Procurements Completed

## Procurements completed (by start date) 01 Apr 2019 - 31 Mar 2020

Award Date	Short Contract Title	Total Contract Value	Contract Start Date	Contract End Date	Supplier Name	Schedule Number				
19/02/19	Audio Visual	£30,000,000	01/04/19	31/03/23	Dunfermline Repair Centre Ltd	0618				
					Irruptus Limited (t/a Efficient Infrastructure Solutions)	0618				
					Learning Space Belfast Ltd	0618				
					Xma Limited	0618				
					SSUK Ltd	0618				
					Avm Impact Ltd	0618				
					Insight Direct (uk) Ltd	0618				
07/06/19	Building & Timber	£60,000,000	01/04/19	31/03/22	The Symphony Group plc	0318				
					Rixonway Kitchens Ltd	0318				
					Rowan Timber Supplies (Scotland) Ltd	0318				
					Travis Perkins Trading Company Ltd	0318				
					Scotia Roofing Supplies Ltd	0318				
					Hall & Tawse Joinery Ltd	0318				
					St Andrews Timber Supplies Ltd	0318				
					Fibo Uk Ltd	0318				
					Sig Trading Ltd	0318				
					Nordan UK Ltd	0318				
					Rembrand Timber Ltd	0318				
					D McNair Builders Merchant Ltd	0318				
					Jewsons (May Trade Under Other Name for Each Contract)	0318				
					Scotdor	0318				
					Thornbridge Sawmills Ltd	0318				
					M & J Timber Ltd t/a M & J Builders Merchants	0318				
					Joinery & Timber Creations (65) Ltd	0318				
					Dumfries Timber Company Ltd	0318				
					Innes Building & Timber (Merchants) Ltd	0318				
					Nu-Style Products Ltd	0318				
Grafton Merchating GB Ltd	0318									
Rearo Laminates Ltd	0318									
MGM Timber (Scotland) Ltd	0318									
10/04/19	Cleaning Equipment	£9,000,000	01/05/19	30/04/22	Mr. Pat Mckay T/a Machines2clean	1818				
					Arrow County Supplies Limited	1818				
					Dmg Floorcare Ltd	1818				
					Nilfisk Ltd	1818				
					Truvox International Ltd	1818				
					Unico Ltd	1818				
					Gt Cleaning Machines Ltd	1818				
					Alliance Disposables Ltd	1818				
					Diversey Ltd	1818				
					Powerwasher Services Ltd	1818				
					29/03/19	Vending Machines	£5,000,000	01/05/19	30/04/22	Templeman Retailing & Vending Ltd
Abercromby Vending Ltd	2118									
Centravend Ltd	2118									
Eden Springs Uk Ltd	2118									
Norscott Vending Services Limited	2118									
Early Bird Catering Ltd	2118									
Excel Vending Ltd	2118									
Ideal Services Ltd	2118									
Selecta U.k. Ltd	2118									
12/08/19	Asbestos	£48,000,000	01/07/19	30/06/21	Specialist Building & Asbestos Services Ltd					2418
Aspect Contracts Ltd					2418					
Lucion Environmental Ltd					2418					
Askams Compliance Services Ltd					2418					
PCS Asbestos Consultants Ltd					2418					
Asbestos Analytical Services					2418					
William Munro Construction (Highland) Ltd	2418									
Enviraz (Scotland) Ltd	2418									

					Omega Asbestos Consulting Ltd	2418
					Acron Asbestos Ltd	2418
					Shield On-Site Services Ltd	2418
					A&C Asbestos Consultants Inc Ltd	2418
					Not One Iota Ltd	2418
					Clyde Environmental Ltd	2418
					Henderson Environment Services Ltd	2418
					Strada Environmental Ltd	2418
					Greenair Environmental Ltd	2418
					Element Materials Technology Environmental UK Ltd	2418
					Erith Contractors Ltd	2418
					Rhodar Ltd	2418
					E.D.P. Health, Safety And Environment Consultants Ltd	2418
					Asbestos Building Surveys Ltd	2418
					Asbestos Specialists (UK) Ltd	2418
					WSP UK Ltd	2418
					Chamic Industrial Services Ltd	2418
					Northern Asbestos Services Ltd	2418
					Damada Asbestos Removals Ltd t/a Damada Group	2418
					Resource And Environmental Consultants Ltd	2418
					Vega Environmental Consultants Ltd	2418
					Carymar Construction Services Ltd	2418
					Clarkes Environmental Ltd	2418
					Gowrie Contracts (Scotland) Ltd	2418
					DNKA Ltd	2418
					Socotec Asbestos Ltd	2418
					Environmental Essentials Ltd	2418
					Wood Group Industrial Services Ltd	2418
					Intona Ltd	2418
					Envirotec Ltd	2418
					MDS Environmental Services Ltd	2418
					Life Environmental	2418
					Plansafe Solutions Ltd	2418
					Enviraz (Surveys) Ltd	2418
					Franks Portlock Consulting Ltd	2418
12/07/19	Alcoholic Beverages	£5,000,000	01/08/19	31/07/22	Tennent Caledonian Breweries Wholesale Limited	0119
26/06/19	Bikeability Scotland Training Providers	£1,200,000	01/08/19	31/07/23	Soulriders (scio)	0319
					Skinny Tyres Ltd	0319
					Glasgow Bike Shed Ltd (trading As Bike For Good)	0319
					Angus Cycle Hub Cic	0319
					West Lothian Bike Library Cic	0319
					Fallin Community Enterprises T/a Recyke-a-bike	0319
					Outfit Moray	0319
					Rural & Urban Training Scheme Limited	0319
					Healthy N Happy	0319
					Cycle Experience Limited	0319
22/08/19	New Build Residential	£1,500,000,000	26/08/19	31/07/21	Mctaggart Construction Ltd	1518
					Andrew Shepherd Construction Ltd	1518
					Central Building Contractors (Glasgow) Ltd	1518
					Cruden Investments Ltd	1518
					CCG (Scotland) Ltd	1518
					Urban Union Ltd	1518
					Ashleigh (Scotland) Ltd	1518
					Jr Construction (Scotland) Ltd	1518
					Engie Regeneration Ltd	1518
					Bancon Construction Ltd	1518
					Chap Group (Aberdeen) Ltd	1518
					Mm Miller (Wick) Ltd	1518
					Springfield Properties PLC	1518
					Clark Contracts Ltd	1518
					Hadden Construction Ltd	1518

					Mears Ltd	1518
					City Building (Contracts) LLP	1518
					Stewart & Shields Ltd	1518
					D. McLaughlin & Sons Ltd	1518
12/09/19	Community Meals	£16,000,000	01/09/19	31/08/22	Apetito Limited	2018
					ICare (GB) Limited	2018
	Security Services and Cash Collection					
09/12/19		£50,000,000	16/09/19	15/09/23	Confida Fm Limited	0719
					G4s Cash Solutions (uk) Limited	0719
					Dcl Security International Limited	0719
					Mitie Security Ltd	0719
					G4s Secure Solutions Uk Ltd	0719
					Croma Vigilant	0719
					Security Plus Limited	0719
					Allander Security Ltd	0719
					Kingdom Services Group Limited	0719
					Atalian Servest Limited	0719
					Securitay Ltd	0719
					Profile Security Services Ltd	0719
					Corporate Service Management Ltd	0719
					Securigroup Limited	0719
	Fresh Bread, Rolls & Bakery Products					
28/08/19		£6,000,000	01/10/19	30/09/22	Black Of Dunoon (bakers) Limited	0419
					D McGhee and Sons Ltd	0419
					Fergusons Bakers Limited	0419
					George Anderson & Sons	0419
					Tower Bakery	0419
	Care Homes For Adults LD Inc Autism					
14/10/19		£106,000,000	11/10/19	15/09/23	Camphill Blair Drummond Trust Ltd	1918
					Caring Homes Healthcare Group Ltd	1918
					The Richmond Fellowship Scotland Limited	1918
					Enhance Healthcare Ltd	1918
					Deanston House Limited	1918
					Sanctuary Care (combined) Limited	1918
					Consensus Support Services Limited	1918
					Orems Care Services Limited	1918
					Capability Scotland	1918
					Ark Housing Association Ltd	1918
					Scottish Autism	1918
					Garvald West Linton Ltd.	1918
					Archway (Respite Care & Housing) Limited	1918
					Swanton Care And Community (southfields House Care Services) Limited	1918
					Cygnnet Health Care Limited	1918
					Voyage 1 Ltd t/a Voyage Care	1918
					Community Integrated Care	1918
					Phew (scotland)	1918
					Parkcare Homes (No.2) Ltd	1918
					Anne Reynolds T/a Denovan Care	1918
					Enable Glasgow Branch	1918
					The Mungo Foundation	1918
					Stoneywood Care Services Ltd	1918
					Real Life Options	1918
	Plumbing And Heating Materials					
09/12/19		£90,000,000	01/12/19	30/11/22	Wolseley UK Ltd	2318
					William Wilson Ltd	2318
					Travis Perkins Trading Company Ltd	2318
					Coram Uk Holding Limited	2318
					Pro Care Shower & Bathroom Centre Limited	2318
					City Plumbing Supplies Holdings Limited	2318
					Jewsons (May Trade Under Other Name for Each Contract)	2318
					AKW Medicare Ltd	2318
					Grafton Merchanting GB Ltd	2318

18/11/19	Sheriff Officers	£4,400,000	01/12/19	30/11/22	Scott & Co (scotland) Llp	0619
					Michael Clark T/a Clarks Messengers At Arms And Sheriff Officers	0619
					Killean & Co, A Partnership	0619
					George Walker & Co T/a Walker Love	0619
					Alex M Adamson Llp	0619
					Stirling Park Llp	0619

**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>
Blythwood Care	Lots 9 and 11	21st March 2019
UPM Kymmene (UK) Limited	Lots 1-2 and 10	22nd March 2019
URM (UK) Limited	Lot 3	25th March 2019
Robertson Metals Recycling Ltd	Lots 4 and 7	5th April 2019
Dalton Demolition Recycling Ltd	Lot 7	10th April 2019
EIS Waste Services Ltd	Lots 1-17 and 19-22	25th April 2019
Oakbank Waste Management Limited	Lots 1-10	17th May 2019
WasteCare Ltd	Lots 14,16 and 20	8th July 2019
Hamilton Waste Recycling Limited	Lots 1, 2, 7, 8, 10, 11, 12, 13 and 22	18th July 2019
Aire Valley Gas Ltd	Lot 14	29th July 2019
Diverse Investments Scotland Ltd t/a Newtown Skips	Lots 4, 7 and 11	31st July 2019
Teprac Fuels Limited	Lots 9 and 11	22nd August 2019
Veolia ES (UK) Ltd	Lots 14, 16, 18 and 19	8th October 2019
Total Homes Cooperative Ltd	Lots 1, 2, 3, 4, 5, 6, 7, 8, 9 and 10	10th March 2020
M McKenzie Waste Ltd	Lot 8	25th March 2020
Brewster Brothers Limited	Lot 13	11th May 2020

**New Offers**

<b>Service Provider Name</b>	<b>Additional Lots Approved</b>
A&M Smith Skip Hire Ltd	11-13, 15 and 21
Avondale Environmental Ltd	11,13 and 17

## 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 2019/20






**SCOTLAND  
EXCEL** 






# Operating Plan






2019 – 2020







**Q4 Progress 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	<ul style="list-style-type: none"> <li>Continue to engage directly with local authority services to identify new collaborative procurement opportunities</li> </ul>		<ul style="list-style-type: none"> <li>A range of new opportunities were identified and delivered over the course of 2019 – 2020.</li> </ul>
	<ul style="list-style-type: none"> <li>Complete the tender process for a new build residential housing framework on behalf of participating local authorities and market this effectively to local authorities and housing associations</li> </ul>		<ul style="list-style-type: none"> <li>The framework for new build housing was completed and awarded in Aug 2019. As part of the launch and mobilisation of the framework a contract management strategy has been implemented. On-going marketing and engagement activity is continuing to promote uptake of the framework by councils and housing associations.</li> </ul>
	<ul style="list-style-type: none"> <li>Embed ownership for the National Care Home Contract (NCHC) within Scotland Excel and refresh the approach to this contract based on the implementation of the NCHC Cost Model ©</li> </ul>		<ul style="list-style-type: none"> <li>A contract review is underway with key local authority partners and COSLA. Figures produced by the NCHC Cost Model were used in negotiations with care provider representatives to set care home rates for 2020-21.</li> </ul>
	<ul style="list-style-type: none"> <li>Complete the delivery of a framework for adult care and support services and secure sustainable funding for ongoing management of this contract</li> </ul>		<ul style="list-style-type: none"> <li>The adult care and support framework tender closed in November 2019, and attracted significant interest from providers. This went live on 1 April 2020, and discussions are underway with early adopters to start using the framework</li> </ul>
	<ul style="list-style-type: none"> <li>Complete the Scottish Government funded project to deliver guidance, procurement templates, and terms and conditions to support the expansion of early learning and childcare provision</li> </ul>		<ul style="list-style-type: none"> <li>The procurement templates and model terms and conditions produced by Scotland Excel to help local authorities purchase early learning and childcare services have now been completed, and have already been used by nine councils. Scotland Excel is continuing to support councils with using this documentation, and discussions are ongoing with Scottish Government on further support that could be delivered through the programme.</li> </ul>





	<ul style="list-style-type: none"> <li>Continue to develop and deliver contract and supplier management (CSM) and key supplier management (KSM) programmes which monitor and enhance the performance of Scotland Excel contracts</li> </ul>		<ul style="list-style-type: none"> <li>Annual key supplier meetings are being incorporated into CSM plans for relevant Scotland Excel frameworks with identified key suppliers invited to meet with procurement leads to address strategic priorities.</li> <li>This commenced with a key food supplier in quarter 3, and will continue throughout 2020/21</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to 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</li> </ul>		<ul style="list-style-type: none"> <li>The Scottish Government have set up a new portfolio team to manage cross-sector construction procurement opportunities. Scotland Excel is actively involved in working groups for this portfolio to represent the needs of the local government sector and ensure there is no duplication with Scotland Excel's construction portfolio.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to inform and support national procurement policy in consultation with the local government procurement community</li> </ul>		<ul style="list-style-type: none"> <li>Regular engagement continues to take place with the Scottish Government to inform their decisions on Brexit preparations. In December 2019, Scotland Excel participated in a Health &amp; Sport Committee round table at the Scottish Parliament, and will continue to be involved in providing evidence for their Social Care Inquiry.</li> </ul>
1.2 Deliver programmes which lead and develop professional, organisational and commercial capability	<ul style="list-style-type: none"> <li>Complete the second cycle of Procurement &amp; Commercial Improvement Programme (PCIP) assessments for all local authorities</li> </ul>		<ul style="list-style-type: none"> <li>Procurement &amp; Commercial Improvement Programme (PCIP) assessments have now been completed for all councils.</li> </ul>
	<ul style="list-style-type: none"> <li>Develop and deliver a targeted programme of sector-wide change projects based on development needs identified by the second cycle of PCIP assessments</li> </ul>		<ul style="list-style-type: none"> <li>Four of the six sector-wide change programmes targeted for this year are in progress, covering contract and supplier management, demand management, developing councils, and local suppliers. Two projects were impacted by vacancies within the team.</li> <li>Further projects will be discussed with the Procurement Improvement Programme (PIP) steering group in 2020-21.</li> </ul>

	<ul style="list-style-type: none"> <li>• Continue to deliver the chargeable consultancy projects and transformation programmes for Fife Council, East Renfrewshire Council and the Tayside councils, and respond to any further requests for these types of services</li> </ul>		<ul style="list-style-type: none"> <li>• The consultancy programmes and projects for Fife Council, East Renfrewshire Council and the Tayside councils are all progressing in line with plans. A new project has commenced for East Lothian Council.</li> <li>• Preparation for a procurement programme for Dumfries &amp; Galloway Council for a number of work packages/procurement exercises began in early 2020.</li> </ul>
	<ul style="list-style-type: none"> <li>• Continue to develop and deliver accredited work-based learning programmes through the Scotland Excel Academy</li> </ul>		<ul style="list-style-type: none"> <li>• The Academy currently has 161 active learners across 15 accredited programme cohorts, and a further 1 cohort is planned at this stage.</li> </ul>
	<ul style="list-style-type: none"> <li>• Develop and deliver a programme of non-accredited practice workshops through the Scotland Excel Academy</li> </ul>		<ul style="list-style-type: none"> <li>• After consultation, The Academy transitioned to a demand-led model for practitioner workshops and thought leadership masterclasses</li> </ul>
	<ul style="list-style-type: none"> <li>• Continue to develop Scotland Excel Academy online resources to support learning programmes and create a community platform for sharing best practice</li> </ul>		<ul style="list-style-type: none"> <li>• Following the refresh of the Academy online platform in August, the operating system was upgraded in December 2019 to boost its functionality. Content is continually evolving as new programmes and cohorts are introduced, and information from events and practitioner workshops is shared with the wider procurement community.</li> </ul>
<p>1.3 Harness the potential of digital technology and data insight to support the delivery of public services</p>	<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>• As part of the National Telecare Steering Group, work continues to develop a framework for digital telecare equipment.</li> <li>• A national framework for social work care case management will be redeveloped following the decision to abandon the previous procurement exercise.</li> <li>• Despite numerous attempts to gather ICT contract data from 32 councils, this data set remains incomplete, hampering the collaborative opportunity.</li> </ul>








	<ul style="list-style-type: none"> <li>Continue to develop data analytic tools and resources to support the expansion of the contract portfolio and provide management information to the sector</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel's project to develop spend data resources continues with a number of additional online tools provided to member councils.</li> </ul>
	<ul style="list-style-type: none"> <li>Complete 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>Scotland Excel is continuing to lead negotiations with Scottish Care, the representative body for independent care home providers. Agreement has not yet been reached on using the NCHC Cost Model for setting care home rates, with providers requesting further movement on a number of commercial aspects. COSLA is continuing to support negotiations.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to develop and share access to Indexation Modelling to track market influences on costs</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel is continuing to use Indexation Modelling across its contract portfolio and is delivering indexation workshops for councils on request.</li> </ul>
	<ul style="list-style-type: none"> <li>Develop plans to roll out data analytic tools to staff across the organisation</li> </ul>		<ul style="list-style-type: none"> <li>Power BI data analytics tools will be rolled out to staff once the development of data resources has been completed in 2020-21.</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, COSLA and other partners to support the development and/or delivery of national policy in social care</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel is continuing to participate as a member of the Scottish Government's Leadership Alliance for the reform of adult social care, and has established a Social Care Steering Group for local government stakeholders to provide a platform for the sector to influence the review.</li> </ul>
	<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 education policies such as early learning provision, pupil attainment funding, and food procurement for school meals</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel continue to support activities in relation to Educational policies. Following on from the meeting In November 2019, hosted by the Deputy First Minister, John Swinney, an announcement has been made to delay the implementation of the new nutritional requirements for schools from August 2020 to April 2021.</li> </ul>




	<ul style="list-style-type: none"> <li>• 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</li> </ul>		<ul style="list-style-type: none"> <li>• Discussions are continuing with the Scottish Government, Scottish Federation of Housing Associations (SFHA) and West of Scotland Housing Association on options for embedding procurement policy within the affordable housing sector.</li> </ul>
	<ul style="list-style-type: none"> <li>• Continue to work with the Scottish Government, Zero Waste Scotland and other partners to support the development and/or delivery of national environmental policy</li> </ul>		<ul style="list-style-type: none"> <li>• In Q4 dialogue with Zero Waste Scotland resulted in agreement to develop and deliver a contract for waste stream analytical services to measure performance against residual waste reduction targets.</li> </ul>
	<ul style="list-style-type: none"> <li>• Develop and deliver a calendar of communications activities which promotes our knowledge and experience in support of our policy and public affairs goals</li> </ul>		<ul style="list-style-type: none"> <li>• The Scotland Excel Conference took place in February 2020. The conference theme was Inclusive Growth and covered a wide range of key policy topics from expert speakers.</li> </ul>
	<ul style="list-style-type: none"> <li>• Explore the feasibility of becoming a Scottish Credit &amp; Qualifications Framework (SCQF) Credit Rating Body to support the expansion of the Scotland Excel Academy and position it as a future provider of Graduate Apprenticeships</li> </ul>		<ul style="list-style-type: none"> <li>• The Academy team submitted a proposal to the Scottish Credit &amp; Qualifications Framework Partnership (SCQFP) to become a credit rating body in November 2019. Additional evidence was submitted on the 31 January 2020 and the SCQFP proposed to run a development workshop and requested The Academy visit an existing credit rating body. Both of these activities are on hold as a consequence of the COVID-19 lockdown. These will be progressed as soon as possible,</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>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>Information is captured in all tenders and monitored through contract management. Around 80% of Scotland Excel's suppliers have confirmed payment of the Real Living Wage. Figures are provided to the Scottish Government for inclusion in Minister's annual report on procurement. An ongoing activity has been identified to publish the details of those living wage accredited suppliers to the Scotland Excel website.</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</li> </ul>		<ul style="list-style-type: none"> <li>Data has been gathered on community benefits for the six month period to the end of September 2019, and the figures were reported to the Joint Committee in December.</li> </ul>
	<ul style="list-style-type: none"> <li>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</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel continue to look at opportunities to embed supported businesses' within the portfolio. Previous reports have made reference to supported businesses' and Social Enterprises such as " Hey Girls " and " Scotland's Bravest Manufacturing Company " Scotland Excel made reference to our commitment to supported businesses' in recent newsletters to councils.</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>Continue to work with the Supplier Development Programme (SDP) to raise awareness of public procurement opportunities and encourage participation among Scottish SMEs</li> </ul>		<ul style="list-style-type: none"> <li>In February 2020 SXL attended the Tayside Meet the Buyer event. SXL were due to attend the Lanarkshire Meet the Real Buyer event in March however this was cancelled due to the Coronavirus pandemic.</li> </ul>











	<ul style="list-style-type: none"> <li>Continue to increase direct and supply chain opportunities for Scottish SMEs and contractors within Scotland Excel contracts, particularly within the construction portfolio</li> </ul>		<ul style="list-style-type: none"> <li>Opportunities to encourage Scottish SMEs participation continue to be considered during strategy development for all contracts.</li> <li>76% of Scotland Excel suppliers are SMEs</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to encourage housing associations to consider the local economic impact they can deliver through the use of Scotland Excel contracts</li> </ul>		<ul style="list-style-type: none"> <li>Housing associations which become associate members of Scotland Excel are being encouraged to use Scotland Excel contracts to access community benefits for their area.</li> </ul>
2.3 Deliver positive and measurable environmental benefits through our contracts	<ul style="list-style-type: none"> <li>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</li> </ul>		<ul style="list-style-type: none"> <li>All Scotland Excel tender documents incorporate environmental considerations including, where appropriate, the weighting and scoring of emissions. Scotland Excel has previously published a report on the opportunities and challenges of reducing plastic waste within the supply chain, which has been shared with stakeholders.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to consider 'whole life' costing within tender evaluations</li> </ul>		<ul style="list-style-type: none"> <li>All Scotland Excel tender documents include appropriate cost evaluation to ensure that overall value is assessed. For example our audio visual framework previously considered energy costs.</li> </ul>
	<ul style="list-style-type: none"> <li>Develop plans for assessing and mitigating the environmental impact of Scotland Excel's activities</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel continues to follow environmentally friendly office practices across the organisation including recycling and agile working.</li> </ul>
2.4 Lead and develop sustainable procurement knowledge and practice	<ul style="list-style-type: none"> <li>Produce an annual report on 2018-19 procurement activity in line with the requirements of the Procurement Reform (Scotland) Act 2014</li> </ul>		<ul style="list-style-type: none"> <li>An Annual Procurement Report for 2018-19 has been published in line with the requirements of the Procurement Reform (Scotland) Act 2014.</li> </ul>
	<ul style="list-style-type: none"> <li>Monitor the progress and publication of annual procurement reports within the local government sector, providing support and guidance to councils as required</li> </ul>		<ul style="list-style-type: none"> <li>Annual Procurement Reports are now established as a fundamental reporting requirement for all Councils. Scotland Excel is continuing to liaise with the Scottish Government and councils to support the publication of Annual Procurement Reports</li> </ul>

	<ul style="list-style-type: none"> <li>• Continue to work with national partners on the development of sustainable procurement guidance and tools</li> </ul>		<ul style="list-style-type: none"> <li>• Scotland Excel is continuing to engage with national partners to ensure the effective delivery of best practice. The current focus on developing practical, proportional guidance for sustainable procurement has resulted in the development and launch of improved Sustainable Procurement Tools.</li> </ul>
	<ul style="list-style-type: none"> <li>• Continue to develop opportunities to increase the local government sector's sustainable procurement knowledge and capability through the Scotland Excel Academy</li> </ul>		<ul style="list-style-type: none"> <li>• Sustainable procurement principles and practices are embedded throughout the Chartered Institute of Procurement &amp; Supply (CIPS) accredited programmes offered by the Scotland Excel Academy, and are incorporated into procurement practitioner workshops. Sustainable procurement was a key theme at this year's Scotland Excel Annual Conference.</li> </ul>
	<ul style="list-style-type: none"> <li>• Develop and implement plans to promote sustainable procurement to elected members and senior officers to support a 'whole organisation' approach</li> </ul>		<ul style="list-style-type: none"> <li>• Sustainable procurement is built into all framework strategies, and this is also included in contract authorisation reports.</li> <li>• Additional reports related to sustainability have been produced</li> </ul>






## Goa1 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 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</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, PCIP assessments and workshops.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to explore further opportunities to use digital technologies to engage with and/or provide online 'self-service' to customers, incorporating the findings into Scotland Excel's ICT strategy and roadmap</li> </ul>		<ul style="list-style-type: none"> <li>A new report detailing spend with local suppliers has been launched for customers. A further report is in development which will provide corporate procurement staff with the ability to carry out more detailed analysis of their own council's spend.</li> </ul>
	<ul style="list-style-type: none"> <li>Explore the feasibility of providing additional services requested by customers, incorporating the findings into future operational plans</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel's Senior Management Team has identified a range of new business opportunities which will be assessed during the first six months of 2020. Customer feedback will also be used to inform new opportunities, and an internal innovation forum is being established to support the development of new services.</li> </ul>
	<ul style="list-style-type: none"> <li>Embed the outputs of Scotland Excel's stakeholder engagement project into all engagement plans and activities, ensuring that these reflect the organisation's expanding customer base</li> </ul>		<ul style="list-style-type: none"> <li>Work to expand and refresh customer and stakeholder mapping across the organisation was completed in Q2. The outputs have been reviewed to inform the development of senior stakeholder engagement plans. Meetings were due to be scheduled during Q4. This has been delayed due to other priorities, but is now underway.</li> </ul>
3.2 Engage stakeholders in the delivery of effective local solutions	<ul style="list-style-type: none"> <li>Continue to incorporate community engagement, where appropriate, into the development of procurement strategies</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel's sustainable procurement strategy has been updated with an enhanced focus on community engagement. Opportunities for stakeholder participation, including wider community engagement, are considered within all procurement strategies.</li> </ul>



			<ul style="list-style-type: none"> <li>Scotland Excel has been engaging with COSLA to align council procurement activities with participatory budgeting goals.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to engage directly with service users, where appropriate, to ensure their needs are considered within service design</li> </ul>		<ul style="list-style-type: none"> <li>Adults and young people with lived experience of the care system were involved during the development of the new secure care framework which was awarded in February 2020.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to work with educational partners and/or suppliers to promote the benefits of procurement to pupils</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel is continuing to work with educational charity, Founders4Schools by attending career fairs and holding mock interviews for pupils. Discussions are underway with Glasgow Caledonian University with a view to offering placements for students with autism.</li> </ul>
3.3 Represent the collective views of stakeholders at a national level	<ul style="list-style-type: none"> <li>Review Scotland Excel's representation activities to ensure that these are targeted where they can have the greatest impact</li> </ul>		<ul style="list-style-type: none"> <li>An updated map of Scotland Excel's wider public sector stakeholder landscape has been completed, and further in-depth workshops assessing the impact of external stakeholder relationships on the care and construction portfolios are taking place.</li> </ul>
	<ul style="list-style-type: none"> <li>Establish a model for undertaking representation activities, including a clear feedback loop for customers and/or communities</li> </ul>		<ul style="list-style-type: none"> <li>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).</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to 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</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel is continuing to liaise with COSLA in key strategic areas such as social care. The recent stakeholder mapping exercise has identified a number of opportunities to strengthen operational level relationships with COSLA.</li> </ul>

3.4 Implement policies which develop, empower, value and engage our workforce	<ul style="list-style-type: none"> <li>• Refresh Scotland Excel's organisational development strategy to incorporate feedback from Investors in People, involving staff in the development of plans, policies and initiatives where appropriate</li> </ul>		<ul style="list-style-type: none"> <li>• A project to refresh Scotland Excel's organisational development strategy began in December. The strategy will be informed by the recent Investors in People report and will incorporate working groups for staff development and innovation.</li> <li>• Although this work continues, progress has been slow.</li> </ul>
	<ul style="list-style-type: none"> <li>• Develop and implement talent management 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 is continuing to identify and develop new approaches to support staff development, workforce planning, organisational development, succession planning and talent management.</li> </ul>
	<ul style="list-style-type: none"> <li>• Complete and embed plans for agile working to create a productive working environment that benefits staff, Scotland Excel, and customers</li> </ul>		<ul style="list-style-type: none"> <li>• Scotland Excel now supports a fully agile workforce where employees can work remotely with full access to email and files held centrally. Scotland Excel staff have been working effectively from home since March 2020 as a result of COVID-19</li> </ul>

## 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	<ul style="list-style-type: none"> <li>Continue to implement appropriate funding models to support the delivery of new and existing services, monitoring income and providing regular reports to the joint committee</li> </ul>		<ul style="list-style-type: none"> <li>Income is being accrued through Academy programmes, consultancy revenue and associate membership fees. The new build residential housing framework is expected to accrue income from 2020-21, and all new frameworks are now being reviewed for rebate potential. An income board meets on a monthly basis to monitor revenue against targets, and indications suggest that the overall income target for 2019-20 will be met.</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 monitor Scotland Excel's business infrastructure to ensure it can support the organisation's growth ambitions, developing plans for continuous improvement and to address any gaps in capacity and/or capability</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel's Senior Management Team has agreed priority ICT projects for the forthcoming 18 months and an implementation plan is in development.</li> </ul>
	<ul style="list-style-type: none"> <li>Develop a risk model for evaluating new business opportunities to assess their impact on internal resources and/or existing customers</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel undertakes appropriate risk evaluation and management for all projects, but a formal model is not yet in place.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to implement technology solutions which increase efficiency, support agile working and offer scalability for business growth</li> </ul>		<ul style="list-style-type: none"> <li>Work is to assess and strengthen the organisation's cyber resilience has been completed, including awareness training for all staff.</li> <li>Work is continuing on the development of business apps which increase staff communication and/or efficiency</li> </ul>
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>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</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel is currently evaluating new growth opportunities through regular horizon scanning meetings and will undertake a competitive review of the markets for existing and potential new products during 2020-21.</li> </ul>

	<ul style="list-style-type: none"> <li>Continue to deliver procurement support to housing associations and implement plans to market additional services to this sector</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel is continuing to provide procurement support to housing associations on request. The Scottish Government has indicated that they will fund a further programme of work for the housing sector, but agreement on the content and start date has not yet been reached.</li> </ul>
	<ul style="list-style-type: none"> <li>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</li> </ul>		<ul style="list-style-type: none"> <li>Eleven new associate members joined Scotland Excel in Q4, generating £17k in annual membership fees. Income is also being generated through chargeable projects for associate members. A Scotland Excel staff member was appointed to a business development role for six months with a remit to increase associate membership.</li> </ul>
	<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</li> </ul>		<ul style="list-style-type: none"> <li>The Scotland Excel marketing team has ensured that Scotland Excel has reasonable profile on all social media platforms.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to identify opportunities arising for staff development through new business opportunities, fostering an understanding of commercial and entrepreneurial approaches across the organisation</li> </ul>		<ul style="list-style-type: none"> <li>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. Staff are being encouraged to get involved in projects during Performance Review &amp; Development (PRD) discussions.</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 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</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel's partnership with the Improvement Service to deliver a qualification in project management was recognised with a Public Service Award in December 2019. This partnership is now expanded to co-deliver a Business Analysis and Innovation programme. Scotland Excel is continuing to pursue a meeting with Skills Development Scotland to discuss partnership</li> </ul>

			opportunities, and is considering other partnerships as part of the stakeholder engagement project.
	<ul style="list-style-type: none"> <li>Continue to manage Scotland Excel's partnership with Crown Commercial Service (CCS) to ensure it is delivering against customer expectations, and explore opportunities to extend this partnership</li> </ul>		<ul style="list-style-type: none"> <li>Scotland Excel's partnership with CCS is continuing to progress well. Recent partnership activities include the co-development of a fleet category strategy. Further collaborative opportunities are being discussed, including the delivery of eAuctions.</li> </ul>
	<ul style="list-style-type: none"> <li>Continue to provide procurement support to SEEMiS in line with the partnership agreement</li> </ul>		<ul style="list-style-type: none"> <li>Work continues to support the development of the Next Generation management information system for schools,</li> <li>Scotland Excel is working on a tender to procure a solution for booking supply teachers, and is exploring procurement options for SMS messaging and cybersecurity.</li> </ul>



## Key Performance Indicators

Outcomes	Key Performance Indicators	Q3 Status
Our services shape the effective and efficient delivery of public services	<ul style="list-style-type: none"> <li>• Number of contracts delivered v plan<sup>1</sup></li> <li>• Value of contract portfolio v target</li> </ul>	<ul style="list-style-type: none"> <li>• 38 of 38 contracts delivered</li> <li>• £1,980 million against £1,900 million target</li> </ul>
Our expertise leads continuous improvement in commercial performance	<ul style="list-style-type: none"> <li>• Number of PCIP assessments delivered v plan</li> <li>• Number of Scotland Excel Academy courses v plan<sup>2</sup></li> </ul>	<ul style="list-style-type: none"> <li>• 7 of 7 assessments delivered</li> <li>• 84 of 88 courses delivered</li> </ul>
Our services facilitate the delivery of national and local policy priorities	<ul style="list-style-type: none"> <li>• Tonnes of waste diverted from landfill through Scotland Excel contracts</li> <li>• Number of Scottish suppliers &amp; percentage SMEs</li> </ul>	<ul style="list-style-type: none"> <li>• 76,685 tonnes (Jul-Sep 2019)</li> <li>• 546 Scottish suppliers of which 76% are SMEs</li> </ul>
Our services enable positive and sustainable outcomes for people and communities	<ul style="list-style-type: none"> <li>• Number of community benefits realised to date</li> <li>• Number of Scottish suppliers &amp; percentage SMEs</li> </ul>	<ul style="list-style-type: none"> <li>• 821 jobs</li> <li>• 275 apprenticeships</li> <li>• 192 work placements</li> <li>• 67,184 hours work experience</li> <li>• 6,362 hours volunteering/mentoring</li> <li>• £1,462m value of other initiatives</li> </ul>
Our insight and knowledge underpins innovative solutions for our customers	<ul style="list-style-type: none"> <li>• Number of business change initiatives delivered v plan</li> </ul>	<ul style="list-style-type: none"> <li>• 4 of 6 initiatives in progress</li> </ul>
Our activities are recognised as leading the way in public procurement	<ul style="list-style-type: none"> <li>• Media coverage v target</li> <li>• Number of speaking engagements v target</li> </ul>	<ul style="list-style-type: none"> <li>• 61 of 60 media items published</li> <li>• 19 of 20 speaking engagements</li> </ul>
Our customers receive a measurable return on investment through savings	<ul style="list-style-type: none"> <li>• Percentage savings achieved across the portfolio v target<sup>3</sup></li> <li>• Savings achieved in the last quarter</li> </ul>	<ul style="list-style-type: none"> <li>• 2.5% against 2.5% savings target</li> <li>• £3m (Oct-Dec 2019)</li> </ul>
Our customers are satisfied with our services and how we deliver them	<ul style="list-style-type: none"> <li>• Customer satisfaction scores v target<sup>4</sup></li> </ul>	<ul style="list-style-type: none"> <li>• 80% of respondents</li> </ul>

<sup>1</sup> Contracts developed, renewed or extended

<sup>2</sup> Programmes, workshops and masterclasses

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

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

Appendix 4  
Planned Procurement to 31/03/2022

## Frameworks due for renewal (or subject to contract extension) by 31 Mar 2022

Short Contract Title	Schedule Number	End Date of Current Framework
Fire Safety Products	1617	15/04/2020
Customer Service Platform	0415	31/05/2020
Street Lighting Bulk Renewal of Luminaires	1013	30/06/2020
Catering Sundries	0915	31/07/2020
Demolition	1115	31/07/2020
Boiler Maintenance	2217	13/09/2020
Recycle And Refuse Containers	0117	02/11/2020
Repair of Catering Machines	2117	07/01/2021
Domestic Furniture and Furnishings	0815	31/01/2021
Power Tools	0218	16/02/2021
Trade Materials	0717	16/02/2021
Bitumen Products	0516	28/02/2021
Milk	1917	28/02/2021
Outdoor Play Equipment and Artificial Surfaces	0215	12/03/2021
Engineering Consultancy	0616	17/03/2021
Vehicle Parts	0116	31/03/2021
Organic Waste	0816	31/03/2021
Energy Efficiency Contractors	0913	30/04/2021
Education And Office Furniture	0216	31/05/2021
Fostering	1015	24/06/2021
Frozen Foods	1016	30/06/2021
Asbestos	2418	30/06/2021
New Build Residential	1518	31/07/2021
Street Lighting Materials	2617	31/07/2021
Personal Protective Equipment	0416	31/08/2021
Fresh Meat, Cooked Meats & Fresh Fish	0118	30/09/2021
First Aid Materials	1018	30/09/2021
Vehicle & Plant Hire	0217	31/10/2021
Tyres for Vehicles & Plant	0417	31/10/2021
Commercial Catering Equipment	1118	31/10/2021
Bottled Gas	0817	05/11/2021
Laundry Equipment	0917	05/11/2021
Steeplejack Services	1017	30/11/2021
Pest Control Services	1217	30/11/2021
Road Signage Materials	1418	30/11/2021
Heavy Vehicles	0317	31/12/2021
Water Coolers	1317	07/01/2022
Swimming Pool Chemicals	1517	07/01/2022
Hot Beverages	1618	13/01/2022
Energy Advice	1718	13/01/2022
Library Books & Textbooks	0617	31/01/2022
Digital Publications and Services	2517	31/01/2022
Grounds Maintenance Equipment	0918	28/02/2022
Secure Care	0219	31/03/2022

Building & Timber	0318	31/03/2022
Electrical Materials	0919	31/03/2022
Fresh Fruit & Veg	1019	31/03/2022

## New Contract Areas

Contract Title	Forecast Delivery date
Social Care Case Management Solutions	Nov 20
Swimming Pool Contractors	Mar 21
Electric Vehicle Charging Points	Mar 21
Lift Maintenance	Mar 21
Digital Telecare	Apr 21
Construction & Building Consultancy	Apr 21