Procurement Strategy
2015 - 2018

SOUTH LANARKSHIRE
Leisure & Culture
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1. Foreword

South Lanarkshire Leisure and Culture Limited have recognised the link between procurement and service delivery and the importance of having a consistent approach to procurement to ensure Best Value is delivered. In 2014/15 we spent £8.34M with nearly 2,000 suppliers. It is clearly vital that we obtain value for money from this expenditure, ensuring we in turn maximise the resources available to deliver front line services at a time characterised by tight financial constraints.

In order to align the procurement objectives of the Trust with the national procurement priorities, it is essential that we all continue to embrace a change to our existing ways of working to ensure the strategic objectives outlined by this strategy, become core to all procurement activities we encounter in the course of our day to day business.

In order to ensure this occurs in practice, we recognise the need for a comprehensive procurement strategy which will detail our objectives and an annual action plan underpinning the delivery of truly effective and efficient procurement activities.

Commitment to and the communication of this strategy is a key step to ensuring that South Lanarkshire Leisure and Culture Limited improve their existing procurement practices and continue to focus on the national priorities outlined within this document ensuring that Best Value is delivered at all times.

Gerry Campbell
General Manager
South Lanarkshire Leisure and Culture Limited
2. Introduction

This procurement strategy sets out the Trust’s aims and goals in relation to procurement for the period 2015 – 2018.

In response to John McClelland’s report ‘Review of Public Procurement in Scotland, 2006’, the Scottish government introduced a programme of reform for public procurement in Scotland. This programme is now entering its third phase which positions procurement as a key driver of policy development, service delivery and sustainable economic growth. New legislation in the form of the Procurement Reform Act (Scotland) 2014 and the new European procurement directives will define this third phase of the programme which covers the period 2014 to 2020 and focuses on the following strategic objectives:

- Efficiency and collaboration
- Deliver savings and benefits (economic, social and environmental)
- Improve access to public sector contracts, in particular, small to medium sized enterprises (SMEs)
- Making sustainable procurement business as usual
- Procurement capability

The value for money triangle sums up the Scottish Model for Procurement outlined above, procurement is not just about cost and quality, but also about the best balance of cost, quality and sustainability.
This strategy aims to provide a common framework through which all of the Trust’s procurement activities can be managed, the above national objectives be met and genuine budget savings achieved.

The strategy will be underpinned by a comprehensive action plan. Standard documentation and appropriate procurement indicators will be used by employees involved in procurement activities to implement the objectives of this strategy.

This strategy recognises the overall objectives of the Trust and South Lanarkshire Council’s procurement objectives, in addition to the national objectives outlined above.

2.1 Organisational details

South Lanarkshire Leisure and Culture Limited (The Trust) is a company limited by guarantee with charitable status and does not have a share capital. It is a ‘not for profit’ organisation and is governed by its Memorandum and Articles of Association.

The Trust was formed on 1 April 2002 to provide sport and recreation services on behalf of South Lanarkshire Council (SLC), and was expanded on 1 October 2010 to also provide cultural and library services.

The main aim of the organisation is to provide facilities for recreation, sport and cultural pursuits which are of maximum benefit to the community and ensure this provision is truly inclusive. The Trust is responsible for the operation, management and development of indoor and outdoor sport and leisure facilities, community halls, arts venues, country parks, libraries and museums.

2.2 What is procurement?

Procurement can be defined as the process of acquiring goods, services or works. The process spans the whole life cycle of whatever is being purchased:

- From identification of needs and formation of a sourcing strategy
- To options and supplier appraisals
- Through to the end of the contract or useful life of an asset

2.3 The need for a procurement strategy

In order to ensure that procurement is being dealt with consistently across all areas of the Trust, ensuring both national (strategic) objectives along with the Trust’s own objectives are being met, a comprehensive procurement strategy is required. The delivery of this strategy will be underpinned by an action plan, the progress of which will be reviewed on an annual basis.
2.4 Communication of the strategy

In order to ensure this strategy is adopted fully within the Trust, it is imperative that it is communicated to all stakeholders including employees, the Board of Directors and all suppliers which the Trust interacts with.

To facilitate this, the strategy will be published on the Trust’s website. Training will also be carried out with key staff to ensure their awareness of the strategy.

2.5 Scheme of delegation, standing orders on contracts, finance regulations

In the current financial climate, there is a considerable pressure on the Trust to save money and achieve Best Value in all areas of expenditure thus strict control of financial resources and the contracts entered into by the Trust is paramount to achieving these efficiencies.

The procedures established herein ensure that the Company Secretary or General Manager authorise the awards of contracts, which commit the Trust to expenditure greater than £50,000 but less than £100,000. Award of contracts valued at over £100,000 must be authorised by the Company Secretary or General Manager, and a Director. This is in accordance with the Trust’s standing orders and scheme of delegation. Contracts of this value are required to be awarded via a tender process as outlined in the Public Procurement Reform Programme guidance, the procurement journey.

Contracts between £2,500 and £50,000 can be awarded as long as it can be evidenced that five competitive quotes have been received, two of which should be from local companies. Such contracts can be awarded by various managers, depending upon their authorised spend limit as outlined in the Trust’s financial regulations.

Prior to awarding any contract, the awarding managers must evidence that Best Value and continuous improvement have been secured for the Trust and ensure that an appropriate balance has been maintained between:

- The quality of performance of the Trust functions
- The cost to the Trust of that performance
- The cost to service users

Whilst also taking into account:

- Economy
- Efficiency
- Effectiveness
- Equal opportunities
Following the award of a contract, there still remains a need for prudent financial control. The Trust maintains a list of authorised signatories which determines the appropriate officers for authorisation of orders below £10,000. It is the responsibility of the Company Secretary to review this list annually ensuring that officers at the appropriate level are so empowered.

This procurement strategy has been developed to revise and update the existing procurement procedures within the Trust to reflect current best practice and to ensure compliance with:

- Scheme of delegation
- Standing orders on contract
- Financial regulations

2.6 Supplier spend analysis

It was identified that there had been little control over purchasing expenditure since the Trust expanded in 2010, with each individual service area maintaining their own list of suppliers, contracts and agreements. The scope to develop this area and potentially make efficiency savings by standardising suppliers/contracts was recognised.

A review of the current purchasing/procurement activity within the Trust discovered:

- Procurement within the Trust is largely decentralised within the £2,500 – £50,000 bracket, with each service managing its own spend in isolation which has lead to duplication of suppliers.
- Procurement in the over £50,000 bracket is characterised by collaborative contracts entered into via SLC (often nationally arranged category A product/service contracts) or contracts which have been administered by SLC Procurement Service on the Trust’s behalf.
- Procurement processes are mainly manual systems, with the main check against site budget being made upon issue of the monthly financial reports. Only one service area retains a formal commitment system, albeit it is not complete as it does not account for all expenditure areas. Three Sport and Physical Activity (SPA) facilities also trialled an electronic procurement system which has not been rolled out any further.
- In 2014/15, the Trust incurred approximately £6.67M expenditure across 1,835 suppliers and the Trading Company incurred approximately £1.67M expenditure across 143 suppliers. It should be noted some suppliers are common to both companies.
- There is no Trust-wide formal monitoring and review of suppliers.
2.7 SWOT analysis

Strengths

- A strong commitment to improving procurement processes
- Procurement Review Group already established
- Group working towards standardising processes across service areas
- Strong link with SLC Procurement Service
- Trust standing orders, scheme of delegation, financial regulation already in place

Weaknesses

- Too many suppliers
- Absence of commitment accounting
- Lack of corporate approach to spending and monitoring of spend corporately
- No formal monitoring and review of suppliers
- Lack of e-procurement system
- Failure to support corporate sustainable aims

Opportunities

- Future development of e-procurement system
- Develop Procurement Review Group through training and experience
- To reduce the Trust’s spending by achieving savings through contract negotiation

Threats

- Lack of SLC/Trust resources to implement e-procurement system
- Resistance from Operational Managers to comply with decisions made by the Procurement Review Group
- Risk of providing inadequate staffing, training, professional advice and IT resources to ensure successful implementation of this strategy
3. Strategic objectives

The overall aim of this strategy is the continuous improvement of the Trust’s procurement activities. This aim fits with the Trust’s 2015/16 Business Plan objective 4.1, “to develop internal and external processes in order to maximise income and control expenditure”, in order that we provide an improved service to our customers. This strategy also ties into various SLC corporate improvement themes as outlined in the current Council Procurement Strategy.

There are eight clearly definable areas in which the Trust aims to improve as follows:

3.1 Procurement, leadership and governance

The Trust has recognised the need to improve procurement across all areas of the business. Procurement requires clear leadership that covers all procurement activity across the Trust and raises awareness of the importance of procurement to staff at all levels.

A clear definition of the roles and responsibilities for all employees involved in procurement activities is required to achieve this goal. It is essential that this is reflected to, and understood by the individual staff members via the PDR process.

Effective communication with all stakeholders is also essential to meet the Trust’s aspirations for improved procurement performance. This will be evidenced by internal communication of this strategy and the revised, consistent Trust-wide procurement processes and procedures. Externally, this will be evidenced via engagement with suppliers, particularly SMEs.

The above aims require to be supported by comprehensive e-business systems which, where appropriate, are easily accessible to all stakeholders including customers, service users and suppliers.

This strategy is linked through the annual business plan to the Trust’s objectives and in turn to SLC’s objectives in the Council Plan, Connect. It also aligns itself with the Scottish Government’s Procurement Capability Assessment (PCA) which is currently being redesigned and renamed as PCIP, and the McClelland report on public procurement.

Procurement activities extend across all activities undertaken by the Trust thus where appropriate, Trust strategies should reflect and take account of the objectives set out in this procurement strategy.

Objectives

- Establish clear strategic procurement leadership that covers all procurement activities across the Trust ensuring alignment with the Trust annual business plan, governance arrangements and SLC’s Procurement Strategy.
Objectives contd.

- Establish active communication routes within the Trust for the dissemination of best practice, revised processes/procedures and advice on problem resolution.
- Participate in active working routes for communication and dialogue on all procurement issues including a forum for sharing best practices and collaborative opportunities.
- Ensure that legally compliant procurement documentation appropriate and relative to the contract type are in place, utilised, reviewed and agreed by appropriate stakeholders involved in procurement activity.
- Ensure that all key Trust strategies are aligned with the aims and obligations of procurement as outlined in the procurement strategy.
3.2 Defining the supply needs

The Trust must continue to develop its approach to procurement in new ways, to deliver ongoing benefits. To support this, processes must allow for innovation, not only from Trust staff but also from the supply base.

By using a standard approach to all procurement projects, this will ensure considerations of the actual need, internal collaboration, external consideration, contract benefits and sustainable opportunities are being taken into account. Questions must be asked at an early stage in the procurement process such as; are the goods/services still required, could they be provided/delivered by a more efficient means, does the proposed delivery mechanism maximise beneficial outcomes whilst minimising negative outcomes.

This objective will be supported by accurate and timely management information which will help to assist in improvements in the operation and performance of contracts.

Objectives

- Standardised initiation documentation to ensure all procurement projects are being challenged with reference to need, collaboration, delivery method, benefits and negative outcomes.
- SLC Procurement Service involvement in all procurement exercises, where appropriate, to explore innovative solutions, share skills and knowledge and maximise the potential for the Trust to achieve efficiencies.
3.3 Collaboration

The need for a collaborative approach to all areas of procurement remains top of the Scottish Government’s agenda for public procurement. The need for collaboration applies not only between the Trust and other Cultural Trusts, the Trust and other public bodies, but also internally between service areas within the Trust. It is therefore imperative that clear, unambiguous procurement processes are in place to ensure the correct approach is taken to all procurement activities, and European legislation is being adhered to.

It is also essential that the Trust continue to participate in forums where best practice is shared and where collaborative opportunities will arise and be discussed. The Trust should actively contribute to collaborative procurements, where appropriate, to ensure that the Trust’s aims and objectives are being met, with particular reference to community benefits and local suppliers.

Objectives

- Consider collaboration as the default position internally to reduce duplication, administration and achieve Best Value for all services.
- Consider existing collaborative contracts the Trust has access to in order to benchmark or avoid expensive procurement exercises.
3.4 Sourcing

It is essential that there is a corporate approach to sourcing in place which supports consultation and collaboration between stakeholders whilst ensuring that all the required internal knowledge has been identified and is involved in the process.

To ensure that this occurs, there must be standard approach to facilitate consistent consideration of key corporate objectives such as financial control, collaboration and sustainability. A standard project initiation document is required which can be completed in conjunction with procurement professionals for all procurement exercises. The lower value procurements do not require such a high level of assessment as higher value/higher risk procurement thus a simplified standard document would suffice.

Objectives

- Adopt a standardised approach to procurement across the Trust, including low value exercises in order to reduce their overall risk.
3.5 Contract and supplier management

The relationship between the Trust and its suppliers is fundamental in ensuring that the products and services purchased by the Trust are fit for purpose, represent Best Value and meet the needs of our customers. It is essential that the Trust seeks the best possible terms available to it in order to obtain Best Value. In doing so, this will help to ensure that all purchases comply with all appropriate quality standards, health and safety standards, legal, environmental and financial regulations.

It is clear that a standardised approach for supplier management and engagement is required throughout the Trust, linking in with SLC Procurement Service as required to provide advice and guidance. An increased visibility of all contracts utilised across the Trust is also required.

The national priorities highlight a requirement to increase the access to public contracts for SMEs. There are various targeted events which take place to increase engagement with SMEs throughout the local area. Staff must be made more aware of these and the various avenues there are available to provide help and advice to unsuccessful suppliers, especially SMEs.

Objectives

- Establish a clear, understandable, standardised approach to supplier management throughout the Trust in order to promote transparency and improve relationships with suppliers.
- Provision of advice and guidance from SLC procurement professionals in relation to areas including contract management, management information and supplier management in order to promote compliance and increase visibility of contracts available.
- Ensure ethical, honest and fair procurement in order to improve access for SMEs and mitigate the risk of challenge from suppliers.
3.6 Purchasing, processing and systems

The Trust is committed to ensuring that the procurement activity it carries out maximises its contribution towards the delivery of efficient and effective services. In order to ensure this, all procurement processes and procedures must be open, robust and continuously improved and developed to reflect recognised best practice. Changing national procurement priorities and the Trust objectives must also be reflected to ensure that efficient procurement decisions are being made.

A critical element of this is the implementation of an e-procurement system. Such systems enhance collaborative opportunities while providing better management information on which to base strategic decisions and potentially reduce costs. In order to improve supplier access to contracts, particularly SMEs, e-sourcing systems should also be investigated and potentially implemented.

Objectives

- Implement an e-procurement system to maximise management information, contract compliance and supplier management.
- Implement Quickquote for all contracts under £50K.
3.7 People

The Trust does not have its own in-house procurement professionals and rely on SLC Procurement Service to provide advice and initiatives to improve procurement efficiency and effectiveness. The SLC Procurement Service relies upon employees having the appropriate knowledge and skill sets within an adequately resourced and structured service, in order to deliver an effective service to all stakeholders.

The Trust aims to create a skilled and motivated staff involved in procurement, committed to delivering excellent customer service, providing advice and guidance to all stakeholders. All such staff should have their current skills assessed and any skill gaps identified, these gaps being met by receiving access to the appropriate training.

Objectives

- Ensure all employees with procurement responsibilities gain the appropriate and relevant skills and level of competence to promote compliance and reduce the risk to the Trust.
- Adopt the Scottish Procurement Competency framework as the mechanism by which the procurement skills and development requirements are identified for all staff involved in procurement.
3.8 Performance management

Performance management is essential to provide the measurement tools, targets, planning and monitoring systems required to track the progress of the ongoing procurement works and assess the effectiveness of the service.

Regular reports on corporate procurement performance to the Trust’s Senior Management Team will assist in identifying opportunities for continuous improvement and innovative ways to deliver this improvement.

Procurement benefits are not always tangible financial benefits which can easily be measured, qualitative or less tangible benefits are difficult to measure but should also be identified and reported. The reported measures will change over time to reflect the diverse needs and aspirations of the Trust.

Objectives

- The effective implementation and roll out of a set of procurement performance indicators that will enable the Trust to plan and measure performance, validate efficiencies/savings, promote compliance and identify areas for improvement.
## Objective

### Section 3.1 Procurement leadership and governance

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<th>Objective</th>
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| Establish clear strategic procurement leadership that covers all procurement activities across the Trust ensuring alignment with the Trust’s annual business plan, governance arrangements and SLC’s Procurement Strategy. | 3.1.1 Clearly define responsibility and leadership roles for procurement activity. Communicate this to all stakeholders. 3.1.2 Develop and implement a formal procurement strategy and action plan. | Company Secretary | December 2015  
Finance Manager | December 2015 |
| Establish active communication routes within the Trust for the dissemination of best practice, revised processes/procedures and advice on problem resolution. | 3.1.3 Procurement Champions to be identified for each service area. 3.1.4 Establish a Trust wide Procurement Review Group that meets on a monthly basis made up of Service area Procurement Champions and Finance representatives. 3.1.5 Develop the Trust website to provide a platform for sharing information electronically across the Trust that will include:  - Contract register  - Links to strategic documents | SMT | September 2015  
Finance Manager | September 2015  
Finance Manager | December 2015, then ongoing |
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<tr>
<td><strong>Section 3.1 Procurement leadership and governance</strong></td>
<td>3.1.6 Attend the SLC Procurement Network and feed back all relevant information via the Trust Procurement Review Group.</td>
<td>Finance Manager</td>
<td>September 2015</td>
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<tr>
<td>Participate in active working routes for communication and dialogue on all procurement issues including a forum for sharing best practices and collaborative opportunities.</td>
<td>3.1.7 Develop standard Trust contract documentation for use in procurements under £50K and develop a set of core terms for inclusion in all such contract documentation in conjunction with SLC Procurement Service.</td>
<td>Finance Manager</td>
<td>March 2016</td>
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<td>Ensure that legally compliant procurement documentation appropriate and relative to the contract type are in place, utilised, reviewed and agreed by appropriate stakeholders involved in procurement activity.</td>
<td>3.1.8 Brief all employees involved in procurement activity of this standard contract document and the requirement to seek legal advice if any deviation from the standard terms.</td>
<td>Procurement Review Group</td>
<td>March 2016</td>
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<td><strong>Section 3.1 Procurement leadership and governance</strong></td>
<td>3.1.9 Review all key Trust strategies to ensure a consistent approach to procurement, identify gaps and liaise with Business Development Manager.</td>
<td>Finance Manager</td>
<td>December 2015</td>
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<td>3.1.10 Update key Trust strategies where required to reflect the aims of the Procurement Strategy.</td>
<td>Finance Manager/ Business Development Manager</td>
<td>December 2015</td>
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<td><strong>Section 3.2 Defining the supply needs</strong></td>
<td>3.2.1 Define and review the Trust’s influenceable spend with a view to maximising opportunities to achieve efficiencies.</td>
<td>Finance Manager/ Procurement Review Group</td>
<td>March 2016</td>
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<td>3.2.2 Develop and implement standard project initiation documentation for all procurements between £2,500 and £50K to define the supply need.</td>
<td>Procurement Review Group/ SLC Procurement Service</td>
<td>December 2015</td>
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<td>3.2.3 All procurements over £50K must be referred to SLC Procurement Service for the sourcing methodology documentation to be completed which will define the supply need.</td>
<td>Procurement Review Group</td>
<td>December 2015, then ongoing</td>
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<td>3.2.4 Involve SLC Procurement Service in procurement exercises under £50K, where appropriate.</td>
<td>Procurement Review Group</td>
<td>December 2015, then ongoing</td>
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<td><strong>Section 3.3 Collaboration</strong></td>
<td>3.3.1 Ensure internal collaborative opportunities are considered, identified and detailed in the project initiation documentation.</td>
<td>Procurement Review Group</td>
<td>December 2015, then ongoing</td>
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<td></td>
<td>3.3.2 Ensure external collaborative opportunities are considered, identified and detailed in the project initiation documentation.</td>
<td>Procurement Review Group/SLC</td>
<td>December 2015, then ongoing</td>
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<td><strong>Section 3.4 Sourcing</strong></td>
<td>3.4.1 Review the Scottish Governments procurement journey documentation and update project initiation documentation as required (linked to 3.2.2).</td>
<td>Finance Manager</td>
<td>March 2017</td>
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<td>3.4.2 Enhance our corporate sustainability in procurement by reviewing current practice against the Scottish Government’s Sustainable Procurement Plan with a view to developing a set of sustainability actions.</td>
<td>Finance Manager</td>
<td>March 2017</td>
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<td><strong>Section 3.5 Contract and Supplier management</strong></td>
<td>3.5.1 Agree a standardised approach to meetings with key contracted suppliers, with standard agenda items such as performance and contract management, forecasting and scheduling information to allow planning and creation of strategies.</td>
<td>Procurement Review Group/SLC Procurement Service</td>
<td>March 2017</td>
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<td></td>
<td>3.5.2 Ensure all Trust staff involved in procurement activity are aware of the SLC supplier development programme.</td>
<td>Finance Manager/Procurement Review Group</td>
<td>March 2017</td>
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<td>3.5.3 Formally review supplier performance over contract term, maintaining a register of lessons learnt for use in future procurement exercises.</td>
<td>Procurement Review Group/Finance Manager</td>
<td>March 2018</td>
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<td>3.5.4 Obtain advice and guidance as required and identified by ongoing work on contracts.</td>
<td>Procurement Review Group/Finance Manager</td>
<td>September 2015, then ongoing</td>
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Provision of advice and guidance from SLC procurement professionals in relation to areas including contract management, management information and supplier management in order to promote compliance and increase visibility of contracts available.
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<tr>
<td>Section 3.5 Contract and supplier management</td>
<td>3.5.5 Advertise and publish all Trust contracts greater than £50K on SLC website and other approved sites in order to maximise competition and information access.</td>
<td>Procurement Review Group/ SLC Procurement Service</td>
<td>March 2016</td>
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<td>3.5.6 Publish and maintain a Trust Contract register on the Trust Corporate Drive for use by all staff undertaking procurement exercises.</td>
<td>Finance Manager/ Procurement Review Group</td>
<td>September 2015, then ongoing</td>
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<td>3.5.7 Advertise all contracts between £2.5K and £50K via Quickquote.</td>
<td>Procurement Review Group</td>
<td>March 2016</td>
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<td>3.5.8 Publish Trust contracts register on Trust website.</td>
<td>Procurement Review Group</td>
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<td>Section 3.6 Purchasing processing and systems</td>
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<td>Implement an e-procurement system to maximise management information, contract compliance and supplier management.</td>
<td>3.6.1 Implement Oracle i-procurement and provide associated training to staff.</td>
<td>Finance Manager/SLC</td>
<td>March 2017</td>
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<tr>
<td>Implement Quickquote for all contracts under £50K.</td>
<td>3.6.2 Implement Quickquote and provide associated training to staff.</td>
<td>Finance Manager/ Procurement Review group/ SLC Procurement Service</td>
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<td><strong>Section 3.7 People</strong></td>
<td><strong>Ensure all employees with procurement responsibilities gain the appropriate and relevant skills and level of competence to promote compliance and reduce the risk to the Trust</strong>&lt;br&gt;3.7.1 Through discussion, agreement and assessment as part of the PDR process, identify all employees with procurement responsibilities, especially the service area Procurement Champions.&lt;br&gt;3.7.2 Ensure all staff with procurement responsibilities have completed the Learn on Line “Procurement Awareness” course as a minimum requirement.&lt;br&gt;3.7.3 Nominate appropriate employees to attend training to update their procurement knowledge.</td>
<td>Company Secretary/SMT</td>
<td>March 2016</td>
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<td><strong>Adopt the Scottish procurement competency framework as the mechanism by which the procurement skills and development requirements are identified for all staff involved in procurement.</strong>&lt;br&gt;3.7.4 Through consultation and communication introduce the Scottish Procurement Competency framework as part of the PDR process to identify and action training needs and promote personal development for service area Procurement Champions.</td>
<td>Company Secretary/SMT</td>
<td>March 2017</td>
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<td><strong>Section 3.8 Performance management</strong></td>
<td>3.8.1 Create a standard suite of reports and performance indicators (PIs) that measure procurement capability and are relevant, accurate and meaningful to internal stakeholders.</td>
<td>Finance Manager/ Company Secretary</td>
<td>March 2017</td>
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<td>3.8.2 Establish an agreed approach for tracking and recording benefits which will evidence progress on benefits and define savings whilst also demonstrating efficient and effective procurement activities are being undertaken in the Trust.</td>
<td>Finance Manager/ Company Secretary</td>
<td>March 2017</td>
</tr>
</tbody>
</table>
If you need this information in a different format or language, please contact us to discuss how we can best meet your needs.
Telephone 01698 476202,
text phone 18001 01698 476202
or e-mail maggi.archibald@southlanarkshireleisure.co.uk

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