
Procurement Strategy and Action Plan 2016-2018

Context

Heriot-Watt University's Strategic Plan contains a vision to be world leading in all its specialist areas of science, engineering, technology and business while creating a knowledge exchange to benefit all of society. The University shall strengthen research intensity in fields of economic and societal benefit; provide truly global education while maintaining our Scottish roots; and deliver excellent student experience and highly employable graduates. Complementary to the Strategic Plan is an Estates Master Plan for the Edinburgh Campus, the cornerstone of Heriot-Watt University. The Master Plan sets out development across the campus for the next 10 years, and has a strong link to sustainability.

The Procurement Strategy, aligned to the Strategic and Estates Master Plans, sets out how Heriot-Watt University will enable sustainable development while achieving regulatory compliance. The Strategy, approved by the University Executive and the University's governing body, Court, is the culmination of consultation and engagement with key stakeholder groups affected by the University's approach to procurement. Consultation benefits the University's procurement strategy by creating exposure to both internal and external scrutiny. This strengthens the understanding of the strategy and the prospect of achievement of its policies, aims and objectives.

The success of the strategy depends upon balancing the University's business and reputational needs with the various regulatory compliance and Government policy delivery expectations that publicly funded bodies face. That focus also needs to take proper cognisance of the environments in which the University operates, to address external drivers and opportunities for improvement where appropriate.

Procurement Strategy

The Procurement Strategy, in conjunction with the Procurement Policy, sets out the University's strategic approach to procurement within the prevailing regulatory environment. The Action Plan element of the Strategy translates the strategic objectives and desired outcomes into the detailed actions and processes required to maintain a sustainable, cost-effective and legally compliant University procurement operation. Its focus is on engaging all staff involved in buying goods and services on behalf of the University, and improving the benchmark Procurement Capability & Improvement Programme (PCIP) score for publicly funded organisations.

Procurement Mission

Heriot-Watt University is committed to obtaining value for money in all of its transactions. In conducting its daily business, staff must always consider the University's wider responsibilities in terms of legal, moral, social, economic and environmental impact. Effective procurement will support the key University objectives across these important operational dimensions.

Strategic Procurement Objectives

Procurement objectives support the University's strategic goals as follows:

1. To be world leading in all its specialist areas of science, engineering, technology and business:
 - i. To work with internal academic budget holders, professional support service colleagues and suppliers to deliver innovation and best value to the learning and teaching, research and service support activities through the development of an effective and co-ordinated purchasing effort across the University.
 - ii. To develop sound and useful procurement management information in order to measure and improve procurement and supplier performance in support of corporate planning, conducted through fair and transparent process.
 - iii. To promote the delivery of value for money through good procurement practice and optimal use of procurement collaboration opportunities.
2. Creating a knowledge exchange to benefit all of society:
 - i. To seek out professional development opportunities to enrich and enhance experience and capability of procurement practitioners.
 - ii. Embed two-way communication with Suppliers to ensure continued value, manage performance and minimise risk throughout the life of contracts for the benefit of customers and students.
3. Sustainable development:
 - i. Embed sound ethical, social and environmental policies within the University's procurement function and to comply with relevant Scottish, UK and EC legislation in performance of the Sustainable Procurement Duty.
 - ii. Sustain and further develop partnerships within the sector (including APUC, and EAUC), with other publicly funded bodies, with professional bodies and appropriately with suppliers that will yield intelligence, innovation and deliver value to users of Procurement Services.

Compliance with the Procurement Reform (Scotland) Act 2014

The table below links the requirements of the Procurement Reform (Scotland) Act 2014 to actions the University's procurement strategy.

Reform Act Requirement	Requirement	Action/Strategy
Relevant and proportionate consultation and engagement when preparing strategy	Optional ('Should')	<p>Prior to formalising a procurement strategy, the University will engage key suppliers and stakeholders to seek feedback on the impact of the strategy over the last 12 months.</p> <p>Feedback will inform enhancements for subsequent strategies.</p>
Consulting and engaging those affected by procurement	Mandatory ('Required')	Where appropriate, prior to a procurement exercise, the University will identify and consult with key stakeholders and suppliers affected by the upcoming procurement activity. The Procurement Policy outlines the process for engaging stakeholders.
Approval of strategy	Optional ('Should')	The University Executive will approve the 2016 - 2018 procurement strategy and 5 yearly updates. Interim updates (<i>e.g.</i> for statutory compliance) will be approved by the Secretary's Board (<i>to reduce the approval process for what are likely to be minor annual changes</i>).
Publishing of strategy	Mandatory ('Required')	The University will publish, and update annually, the Procurement Strategy on the internet at: https://www.hw.ac.uk/services/procurement.htm
Ensure regulated procurements contribute to the University's functions and achievements	Mandatory ('Required')	Strategic procurement objectives are aligned to the Heriot-Watt Strategic Plan. Relevant consultation will be conducted when developing a procurement strategy (applies to category and one-off procurement strategies also).
Ensure procurements deliver value for money	Mandatory ('Required')	<p>The University will sort purchasing into procurement categories. Purchasing of goods and services - will be subject to annual review [with APUC, end user and supplier consultation]. Annual review will allow:</p> <ul style="list-style-type: none"> • Optimal category strategies to be developed and agreed • Sensible aggregation opportunities identified • Most appropriate procurement routes to market chosen <p>Where appropriate, collaborative contracts will be used to deliver improved contract terms, contract and supplier management, sustainable procurement outcomes and value for money.</p>

		<p>Quality, risk and sustainability factors, along with cost, will inform decisions to award regulated contracts.</p> <p>The University will ensure that it awards regulated procurements only to businesses that are capable, reliable and, where relevant, that can demonstrate that they meet high ethical standards and values in the conduct of their business.</p>
Ensure procurements treat economically operators equally and without discrimination	Mandatory ('Required')	<p>Appropriate early engagement will allow the University to understand the market for goods and/or services and potential alternative solutions.</p> <p>The University will conduct all regulated procurements in compliance with EU Treaty Principles of equal treatment, non-discrimination, transparency, proportionality and mutual recognition.</p> <p>The University will take steps to make it easier for smaller businesses to bid for contracts. Legislative constraints preclude preferences for only local suppliers but the local dimension can be addressed through the structure of tenders, the use of Public Contracts Scotland and Quick Quotes, training and information to build capacity, and publishing a contracts register to highlight contracts for which local organisations may be interested in bidding.</p>
Ensure procurements are transparent and proportionate	Mandatory ('Required')	<p>The University shall utilise portals including PCS and PCS-T to publish its procurement opportunities and shall strive to ensure appropriate use of lotting, output based specifications and clear evaluation criteria to ensure the procurement is accessible to as many bidders as possible.</p>
Sustainable procurement duty	Mandatory ('Required')	<p>To prioritise and assess sustainability risks and opportunities, the University will utilise a range of available tools. Including, where appropriate, Prioritisation, Flexible Framework, APUC's Code of Conduct, and APUC's Sustain tool.</p> <p>Consideration of environmental, social and economic issues and benefits will be made, where appropriate, and on a contract-by-contract basis during the planning stage.</p>
Community benefits	Mandatory ('Required')	<p>The University's Procurement Policy outlines in more detail the community benefits policy.</p> <p>To summarise, for every procurement over £4m, the University will consider how it can improve the</p>

		economic social or environmental wellbeing of its area through inclusion of community benefit clauses, to assist with its strategic objective of sustainable development. An example of a community benefit used is the requirement of a main construction contractor to employ an additional apprentice for the duration of a major project.
Payment of living wage	Optional ('Should')	<p>The University recognises the values of a well-motivated and dedicated workforce both in its own organisation and in those of its suppliers. It also recognises that the Scottish Government views the Living Wage as a key indicator of an employer's commitment to fair work place practices.</p> <p>Where relevant to the industry, the University will promote the Living Wage in tender documentation.</p>
Health and Safety	Optional ('Should')	<p>Where the delivery of goods, services or works results in suppliers carrying out work on site at one of the University's locations, the supplier will be required to adhere to the Health and Safety (H&S) Policy. Where relevant, the H&S Policy is included in tender documents to ensure all prospective suppliers are fully aware of the University's requirement prior to submitting a tender.</p> <p>For high-risk contracts, a dedicated H&S team are consulted and feedback included in ITT documentation.</p>
Fairly and ethically traded goods and services	Mandatory ('Required')	The University supports fairly and ethically traded goods. Where relevant it shall make use of appropriate standards and labels in its procurements to take account of fair and ethical trading considerations, and will consider equivalent offerings from suppliers in its tenders.
Food	Optional ('Should')	The University will find practical ways to supply healthy, fresh, seasonal, and sustainably grown food, which represents value for money whilst improving the health, wellbeing and education of our teaching and learning communities, coupled with promoting the highest standards of animal welfare. The University will work to put in place affordable contracts, which meet the nutritional requirements for food for all users of our catering services.
Late payment legislation	Mandatory ('Required')	The University will comply with Late Payment legislation and will review, on a contract-by-contract basis, whether such obligations should be enforced and monitored further down its supply chain, viz: sub-contractors.

Annual Report

The University will produce an annual report on progress against these objectives and publish it on the University's Procurement website. This report, produced as soon as practicable after the end of the financial year, will describe how the University has discharged its obligations under the Procurement Reform Act and how it has exercised discretion and judgement as permitted by the public procurement rules to secure strategic objectives in compliance with the Act.

The Annual Report will include:

1. A summary of the regulated procurements that have been completed during the year covered by the report.
2. A review of whether those procurements complied with the authority's procurement strategy.
3. To the extent that any regulated procurements did not comply, a statement of how the authority intends to ensure that future regulated procurements do comply.
4. A summary of any community benefit requirements imposed as part of a regulated procurement that were fulfilled during the year covered by the report.
5. A summary of any steps taken to facilitate the involvement of supported businesses in regulated procurements during the year covered by the report.
6. A summary of the regulated procurements the authority expects to commence in the next two financial years.
7. Other information as the Scottish Ministers may by order specify.

Action Plan

Objective	Outcomes	Main Actions & Commitments	Key Performance Indicators/Benchmark Data	Completion Date	Responsibility	Priority H/M/L	PCIP Ref Full/Med	PCIP Ref Lite	RAG
Sustain and further develop partnerships within the sector (including APUC, and EAUC), with other publicly funded bodies, with professional bodies and appropriately with suppliers that will yield intelligence, innovation and deliver value to users of procurement services	Optimised use of Cat A, B and C1 collaborative contracts and extension of early procurement contributions of value to all areas of influenceable expenditure.	Scrutinise annual expenditure analysis to improve its utility. Identify collaborative regulated procurements and categorise Establish contracts register [see Note* in Annex B below].	Numbers and values for A B and C1 business as % of totals Number and value of contracts covered by register	Qu 4 2016	CPO	HIGH	Dashboard Qu 1.2 Qu 2.1 Qu 2.2 Qu 3.3	Dashboard 2.1 3.3	A
	Established network with APUC, other sector consortia, sector representative bodies for collaborative and professional development	Benchmarking of good practice standards and procurement performance standards	Use of BPIs	Ongoing with periodic progress reports	CPO	MEDIUM	Qu 1.10	1.5	G
	Extension of best practice methods and ethical values to all phases of the procurement process.	Processes mapped to the Procurement Journey using internal and external training resources	Details of training delivered and numbers involved	Annual	CPO	MEDIUM	Qu 1.5	1.4	A
	Development of a shared, integrated procurement strategy development process	Develop forward contracting plan and strategies and relate these to sectoral, regional and national contracting plans	Number and value of contracts covered by contracting strategies expressed as % of totals	Annual Contracting Priorities	CPO	MEDIUM	Qu 1.3 Qu 2.1	1.2 2.1	G
	Effective supplier management, development and performance measurement processes	Apply Kraljic segmentation analysis to the supplier base and develop supplier relationship management processes accordingly	Number of suppliers and value of business subject to segmentation analysis	Annual	CPO	MEDIUM	Qu 3.1	3.1	A
	Development of understanding of supplier capability and strategy	Conduct regular market analysis Put implementation plans and exit strategies in place as appropriate	Profile by number and value the business done locally regionally and nationally. Use of invoice post code analysis	Annual	CPO	MEDIUM	Qu 2.4	2.1	G

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To work with internal academic budget holders, professional support service colleagues and suppliers to deliver innovation and best value to the learning, research and service support through the development of an effective and co-ordinated purchasing effort within the University.	Establishment of an internal buyers network and optimised cross-functional collaboration to secure benefits of aggregation of demand and future contract planning	Establish/ develop a strong devolved internal 'Lead Buyers' network. Develop a procurement action plan.	Number of 'Lead Buyers' Total £ value of Lead Buyer expenditure	Ongoing with annual reporting	CPO & Lead Buyers/ Procurement Group	HIGH	Qu 1.2 Qu 1.9	1.1	R
	Procurement information routinely communicated to people who need to know	Co-ordinate procurement initiatives and disseminate procurement information from external sources e.g. APUC contract and advisory information. Optimise use of intranet (or \equiv) to communicate.	Record of number, frequency and forms of communications	Quarterly review Annual Report	CPO	MEDIUM	Qu 1.9 Qu 1.10	1.5	A
	Procurement training and/or guidance systematically applied to points of need	Ensure all staff involved in procurement process can receive appropriate training	Record of staff attending individual training events, also to include counter fraud and conflict of interest issues	Ongoing linked to changes and turnover	CPO + HR + APUC	LOW	Qu 1.5 Qu 1.8	1.4 1.6	G
	Implementation of efficient procurement processes e.g. tendering, requisitions, approvals, order and invoicing processes.	Review processes and optimise use of e-tools Including PCS for all regulated procurements & PCS-T	Record number and types of e-transactions quarterly/annually and as % of total transaction type and total value of transaction type e.g. bids* orders, invoices and monitor over time	Quarterly, Annual reports	CPO + Lead Buyers Group + Finance	MEDIUM	Qu 4.1 Qu 4.3	4.1	A
		Robust internal control systems for procurement processes and systems	Clean audit report	Periodic	Internal Audit	MEDIUM	Qu 1.6	1.6	
	Suppliers and potential suppliers provided with guidelines and advice on doing business with University and with APUC	Clear communication on procurement issues and links on website.	Outputs of stakeholder and supplier satisfaction surveys	Ongoing – Quarterly & Annual	CPO + ICT	HIGH	Qu 3.1 Qu 3.2	3.1 3.2	A
	Strengthened senior management appreciation of role purpose and value contribution of procurement	Provision of SMT periodic reports plus annual report	Trend reporting in SMT reports	Quarterly + Annual	CPO + FD + Acc Manager	HIGH	Qu 1.1	1.1	A
	Wide stakeholder buy-in	Review comm's plan and comm's methodology	Stakeholder engagement record	Annual & Ongoing	CPO	MEDIUM	Qu 3.4	1.5	A

*Total number of notes of interest and bids submitted in PCS or PCS-T, plus total No. of bids submitted from SMEs in last FY

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To promote the delivery of value for money through good procurement practice and optimal use of procurement collaboration opportunities	<p>Clear specifications and procurement strategies agreed with stakeholders</p> <p>Regular review of the need for and performance of contracts prior to developing replacement procurement strategies</p>	<p>Review organisational expenditure data to identify contracts in place, contracts with stakeholder agreed strategies, regulated procurements</p> <p>Training of organisational staff on best procurement practice including appropriate approaches to regulated procurements in use of specifications, selection and award criteria.</p> <p>Establish a plan to develop commercial acumen.</p>	<p>Total expenditure on projects, goods and service and % of total expenditure influenced by procurement,</p> <p>%’s of total expenditure covered by Cat A, Cat B, Cat C1 and Cat C contracts</p> <p>% expenditures by Cat</p> <p>% of total value covered by contracts in the last FY</p> <p>% of total expenditure covered by a contracts register [see Note* above],</p>	<p>Annual & Ongoing</p> <p>Training provided according to needs assessment</p>	CPO + Lead Buyers + Acc. Manager	HIGH	<p>Dashboard Qu 2.1 Qu 2.3</p> <p>Qu 1.9</p>	<p>D’board 2.1 2.2</p>	R
	Category contract strategies that detail the organisational approach to regulated procurements	Expenditure data sorted into categories	% by value and number of contracts that are EU regulated procurements,	Annual & Ongoing	CPO + Lead Buyers + Acc. Manager	MEDIUM	Dashboard	D’board	A
	Minimisation of duplication of procurement activity within the University and between the University and partners e.g. CoE	Review expenditure on goods and services covered by duplicate contracts and remove duplicated effort where feasible and beneficial	% by value and number of contracts that are ‘lower value regulated procurements’ (i.e. goods and services > £50k and works > £2m),	Annual & Ongoing	CPO + Lead Buyers + Acc. Manager	MEDIUM	Dashboard	D’board	A
	Management and measurement of performance of contracts in line with stakeholder and supplier agreements over the lifetime of the contracts	<p>Develop commodity strategies in line with Procurement Journey</p> <p>Contract and supplier management processes applied to all significant provision and associated suppliers securing service improvement and/or opportunities for innovation</p>	<p>% savings, cost avoidance or other efficiencies i.e. cash and non-cash savings</p> <p>Totals of maverick and compliant exp in last FY</p> <p>Procurement cost as % of total trade expenditure</p>	Annual & Ongoing	CPO + Lead Buyers + Acc. Manager	HIGH	<p>Dashboard Qu 2.2 Qu 2.3</p> <p>Qu 3.3</p> <p>Qu 2.5 Qu 3.1 Qu 3.2</p>	<p>D’board 2.2</p> <p>3.3</p> <p>2.3 3.1 3.2</p>	R
	Periodic and annual savings and benefits reports to SMT and stakeholders	<p>Recorded savings and benefits calculated according to agreed sector and national criteria</p> <p>Reports to Management & stakeholders</p>		Annual & Ongoing	CPO + Lead Buyers + Acc. Manager	HIGH	<p>Dashboard Qu 3.4</p> <p>Qu 1.10</p>	D’board	G

Objectives	Outcomes	Main Actions & Commitments	Key Performance Indicators/Benchmark Data	Completion Date	Responsibility	Priority H/M/L	PCIP Ref Full/Med	PCIP Ref Lite	RAG
<p>To seek out professional development opportunities to enrich and enhance experience and capability of procurement practitioners</p> <p>Embed two-way communication with Suppliers to ensure continued value, manage performance and minimise risk throughout the life of contracts for the benefit of customers and students</p>	A high calibre procurement team with competency based training and skills development programmes. Structured recruitment, career development and retention programmes with a focus on sustainability	Conduct high level analysis of procurement competencies and skills profiles required at different levels of procurement engagement and conduct gap analysis	<p>Number of people in the procurement team</p> <p>Number of procurement officers with MCIPS or MSc per £m of influenceable expenditure</p>	Ongoing	CPO	MEDIUM	Dashboard Qu 1.4 Qu 2.6	Dashboard 1.3	A
	Sustainable procurement champion/s identified, visible across the University and trained to an advanced level.	<p>Sustainable procurement champion formally recognised and communicated to the University.</p> <p>Appropriate training identified as part of personal development</p>	<p>Increased visibility of sustainable procurement champion across a range of communications channels</p> <p>Personal development registers contain appropriate training</p>	Ongoing	CPO	MEDIUM	Qu 2.6		A
	<p>Devolved procurement competencies assessed across the University</p> <p>Procurement induction programmes for all new appointees, with explicit focus on sustainable procurement</p>	Address shortfall by encouraging involvement with or attendance at training and development courses and events with results monitored and recorded.	<p>Number of authorised or delegated purchasing staff outside Procurement per £m of influenceable expenditure</p> <p>Number of procurement officers to have undertaken formal training & development in the past year</p>	<p>Ongoing</p> <p>Annual</p>	CPO, FD, HR, Budget holders, APUC	MEDIUM	Dashboard Qu 1.5 Qu 2.6	Dashboard 1.4	A
	Two-way managed supplier relationships to simplify doing business with the organisation while driving down risk and improving performance and value	Construct customer positioning and supplier relationship matrices to determine appropriate tactical and strategic approaches to supply markets	<p>%’s of ‘significant’ suppliers falling into</p> <p>rethink strategic control leverage</p> <p>positioning categories</p>	Immediate then periodic reviews	CPO + Budget holders	HIGH	Qu 3.1	3.1	R
	Supplier/customer positioning, development and leveraging to assure optimum value delivery while managing supply side risks and opportunities.	<p>Obtain regular customer input/feedback</p> <p>Obtain regular supplier input /feedback</p>	<p>Survey trend analysis</p> <p>Include in annual reports</p>	Periodic [but important to avoid the process becoming burdensome]	CPO	MEDIUM	Qu 1.10 Qu 3.5	1.5	A
	A robust procurement risk register	Develop weighted impact-and-probability procurement risk assessment methodology	Data drawn from risk criticality rating matrix	Immediate with regular reviews	CPO + SMT	HIGH	Qu 1.7	1.6	R
	Robust systems analysis and development with optimal exploitation of “e” procurement tools in place	Produce [or review if already produced] a procurement ICT strategy	Benefits reports on - <ul style="list-style-type: none"> • time saved • faster order-to-delivery • Purchasers directed to approved suppliers, improving compliance and reducing time sourcing items. • price leverage. • reduced costs of stationery, postage, copying and associated admin. • high quality, detailed management information. 	Immediate then periodic review	CPO, FD, ICT	HIGH	Qu 4.3	1.5	A
To develop sound and useful procurement management information in order to measure and improve procurement and supplier performance in support of corporate planning conducted through fair and transparent process	Sustainability benefits are recorded can be used for case studies if required	Develop a sustainability benefits register	<p>Measure:</p> <ul style="list-style-type: none"> • Carbon savings • Community benefits • Energy reductions • Waste reductions • Recycling 	Ongoing		HIGH	Qu 2.6		A
	Individual sustainability performance is measured								A
	Use of benefits measurement to record efficiencies generated by procurement activity.	Adopt efficiency measurement model or ≡	<p>Measures of</p> <ul style="list-style-type: none"> • Price reduction. • Added value. • Risk reduction. • Process re-engineering. • Sustainability. 	Annual	CPO + APUC	HIGH	Qu 3.5	2.3	G

	Annual customer satisfaction questionnaire	Established a procurement network to gather and disseminate information	Periodic surveys analysed to show satisfaction trend analysis	Periodic [but important to avoid the process becoming burdensome	CPO	MEDIUM	Qu 1.10	1.5	A
	Annual report records achievement against strategic objectives.	Prepare periodic reports that address both management needs and the requirements of the PR(S)A. Prepare annual report on performance against procurement strategy.	Benchmark report content and scope with peer organisations	Annual – as soon as practicable after each FY	CPO + Acc. Manager	HIGH	Qu 1.3	1.2	R
	Improved management of suppliers by means of performance review with key suppliers.	Gather data on supplier performance. Compare supplier performance using data from internal audits and benchmarking information from other organisations of a similar size	Cost reduction and service improvements reports	Quarterly and Annual	CPO + Acc. Manager	MEDIUM	Qu 3.1 Qu 3.2	3.1 3.2	A

Objective	Outcomes	Main Actions & Commitments	Key Performance Indicators/Benchmark Data	Completion Date	Responsibility	Priority H/M/L	PCIP Ref Full/Med	PCIP Ref Lite	RAG
Embed sound ethical, social and environmental policies within the University's procurement function and to comply with relevant Scottish, UK and EC legislation in performance of the sustainable procurement duty	Appropriate use of tools to identify high risk commodities, embed relevant and proportionate requirements into contracts, encourage good practice and analyse opportunities to maximise social, economic and environmental outcomes through procurement action	Set out the organisational policy on how regulated procurements are to be undertaken in compliance with the sustainable procurement duty Apply the prioritisation methodology, Flexible Framework, SUSTAIN. to develop action plans, contracting strategies and to focus resources of high risk and/or influenceable commodities	Number and value of relevant contracts as % of total regulated contracts Achievement of Level 3 FF	Annual Reporting End 2016	CPO + Budget holders CPO + APUC	HIGH	Qu 1.3 Qu 2.3 Qu 2.6	1.2 2.2 2.4	R
	Consideration of whole life costs, environmental and social impacts in assessment of value for money	Embed sustainable procurement duty processes in commodity and category strategies, tender docs & evaluation criteria	Number and value of contracts with sustainability objectives and criteria embedded as % of relevant total	Immediate appraisal then annual reporting	CPO + Acc. Manager	HIGH	Qu 2.5 Qu 2.6	2.3 2.4	A
	Reduced demand for goods and services by cutting down on waste, and encouraging re-use and re-cycling and use of the least environmentally damaging goods and services	Develop internal training and guidance	Maintain a waste hierarchy record – • waste prevention, • reused, • recycled, • recovered including energy recovery • safe disposal.	End 2016	CPO + APUC	MEDIUM	Qu 1.5	1.4	G
	Suppliers led to: • promote awareness of sustainability objectives • adopt sustainable approaches in production of goods/services within their own supply chains • improve their performance in relation to sustainability objectives • address barriers to entry of SMEs and local suppliers	Organise supplier engagement and supplier 'conditioning' sessions to advise on organisational objectives under the sustainable procurement duty	Number of suppliers engaged. Improved outcomes recorded and reported Forward targets and strategies in place	Ongoing	CPO + SMT + APUC	MEDIUM	Qu 3.1	3.1	A

Annex B

Dashboard Measures (Required in all Full, Medium and Lite PCIPs):

Total Procurement Relevant Spend in the Last Financial Year
Total Procurement Influenced Spend in the Last Financial Year
Upheld Procurement Legal Challenges in the Last Financial Year
Value of Contracts / Frameworks in the Contracts Register* see note below
Percentage of current Cat C Contracts / Frameworks in Place Covered by a Strategy
Total through a Collaborative Contract in the Last Financial Year
Total Relevant Spend through a CAT C Contract in the Last Financial Year
Total Forecasted Cash Savings For the Last Financial Year
Cat C - Forecasted Cash Savings in the Last Financial Year
Total Cat A & B Cash Savings Secured in the Last Financial Year
Total Cat A & B Cash Savings Delivered in the Last Financial Year
Total CAT C Cash Savings Secured For the Last Financial Year
Total CAT C Cash Savings Delivered For the Last Financial Year
Non-cash Savings Value For the Last Financial Year
Compliant Spend to Contract / Framework For the Last Financial Year
Maverick Spend For the Last Financial Year
Total No. of Live trade suppliers
Total Spend to SME Suppliers in the Last Financial Year
No. of SME suppliers used in the Last Financial Year
Total No. of Purchase Orders (POs) in the Last Financial Year
Total No. of eProcurement POs in the Last Financial Year
Total No. of Invoices in the Last Financial Year
Total No. of eInvoices in the Last Financial Year
Payment Performance in the Last Financial Year
No. of FTE People in the Procurement Team
No. of Procurement Officers within the Procurement Team Qualified, or Working Towards MCIPS or an Equivalent Qualification that includes Procurement

No. of Procurement Officers in Procurement Legislation Training Within last 12 months of when Legislation / Remedies have Occurred.
No. of Authorised or Delegated Purchasing Staff outside Procurement
No. of Modern Apprentices

Optional/Ring-fenced in the Dashboard (Optional – if data exists it should be provided / Ring-fenced – could be required by Ministers in line with Regulations):

Number of Suppliers Used within the Last Financial Year
Total eProcurement Spend in the Last Financial Year
Retrospective POs in the Last Financial Year
No. of Procurement Officers within the Procurement Team Qualified with MCIPS or an Equivalent Qualification that includes Procurement
No. of Contracts with Community Benefits Clauses in the last financial year
No. of Tenders with Community Benefits Questions in the last financial year
Spend with supported businesses in the last financial year
No. of supported business suppliers in the last financial year
% spend through PCS- 80%