

Procurement Plan



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|--------------------------|------------------|-------------|
| TITLE: | VALUE: | Ref: |
| Procurement Lead: | Date: | |
| Client Lead: | Position: | |

Description: *What is required to be bought? Description, volumes, values and changes over time. Describe Clients and Funding source*

Linkage to Category Strategy:

Is there a Procurement Board approved Category Strategy? Does this PP comply with it? If not, why not? Consider Kent Businesses how has this been addressed?

Business Objectives:

- *Clear statements of what the business objectives are for this procurement. Should be available in the Business Case.*

Current Supply arrangements:

description of the current supply set-up: supplier, volumes, spend levels, how it works, what works well, what doesn't, contract end date, etc. If new requirement, say so

Market Position:

an assessment and description of the supply market. Size, KCC position, competitiveness, development opportunities, risks, etc

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Procurement Risks:

what are the main risks in carrying out this procurement (what could go wrong?) How do we mitigate these risks?

| Risk | Controls/Mitigating Action |
|-------------|-----------------------------------|
| | ➤ |
| | ➤ |
| | ➤ |
| | ➤ |

Procurement Route Options & Evaluation:

Part: A/B OJEU:
Should this be a framework or contract? Why?
Multi-supplier or single supplier? Why?
Open, Restricted, CD? Why?
Single Tender Action? Why?
E-Auction why not?

Procurement Route Recommendation:

Summary of selected route and why

Outline Timescales:

Advert Date? PQQ date etc Planned award date. Any key milestone or review dates eg Cabinet Meeting

Resources Required:

How much of your time roughly will this consume eg 10 days over a 2 month period. Client resources: are they lined up adequately? If not what do we need to do?
Attach RACI if required

Reviews Planned:

what planned reviews are there or are needed through the procurement? Legal? Finance? Procurement Board?

Approval to Proceed:

Signed:

Name:

Date:

Check List

Please review items on check list and complete response box and where appropriate include in plan above.

| Check Item | Action Required | Response |
|----------------------------------|--|--|
| Social Value | Social Value needs to be considered | <i>Ensure consideration of Social Value is recorded</i> |
| Equalities Impact Assessment | Is and impact assessment necessary, most cases this will be a requirement the Service are responsible for carrying this out. If in doubt contact Janice Hill, Equalities & Diversity Officer 01622 221981 | <i>Please confirm in place if reqd, don't forget this is a service responsibility not procurement</i> |
| Legal Support Required | Legal support requirement should be considered and agreed with the client. Also if a risk of challenge has been highlighted this should be communicated to legal and added to the risk register on the shared drive. | <i>Record in Risks and Risk matrix</i> |
| Kent Business | Ensure plan has addressed supporting Kent Business | |
| TUPE/Pension Staff Transfers | Ascertain if there is any possibility of staff transfers and discuss with Client. If TUPE or Pensions may be involved for TUPE discuss with legal for Pensions see Steven Tagg | <i>Ensure Client has considered these, if any staff transfer involved inform Legal to ensure TUPE and Pension strategy is clear.</i> |
| Environment | Are there environmental issues or implications in this contract | |
| Business Continuity | Business continuity issues this does not just mean IT but consideration of providing essential services | |
| Financial Risk | What is the financial risk associated with this contract, Supplier Risk: how much assessment of the supply base is necessary, what is the risk if a supplier fails. If the tender is above EU value we should use Finance Projects Team to carry out financial assessments. Budget Risk: Is the budget confirmed for the duration of the contract | <i>Ensure an agreed financial evaluation of contractors is laid out in the procurement plan.</i> <i>Check budget/funding with finance Business Partner.</i> |
| Collaboration/Access to Contract | Will this contract be shared with others, if so how is procurement being undertaken. | <i>Detail in plan</i> |

RACI Template (The template below is an example only please draw up template to suit your project)

| Team Member | Proc Officer | Service Lead | Service Specialist | Service Director | etc |
|--------------------------|--------------|--------------|--------------------|------------------|-----|
| Action | | | | | |
| Draft Procurement Plan | A/R | C | C | I | |
| Specification | C | A | R | I | |
| Tender using Procontract | R | A | C | I | |
| Evaluation | C | A/R | R | I | |
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| RACI | Definition |
|-------------|---|
| Accountable | The role who is responsible for ensuring the action takes place (can only be one) |
| Responsible | The role or roles who actually carry out the action |
| Consulted | Roles that will be consulted about the task (views need to be considered) |
| Informed | Roles that will be informed (no decision making or influencing role) |