



Procurement Plan

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.*

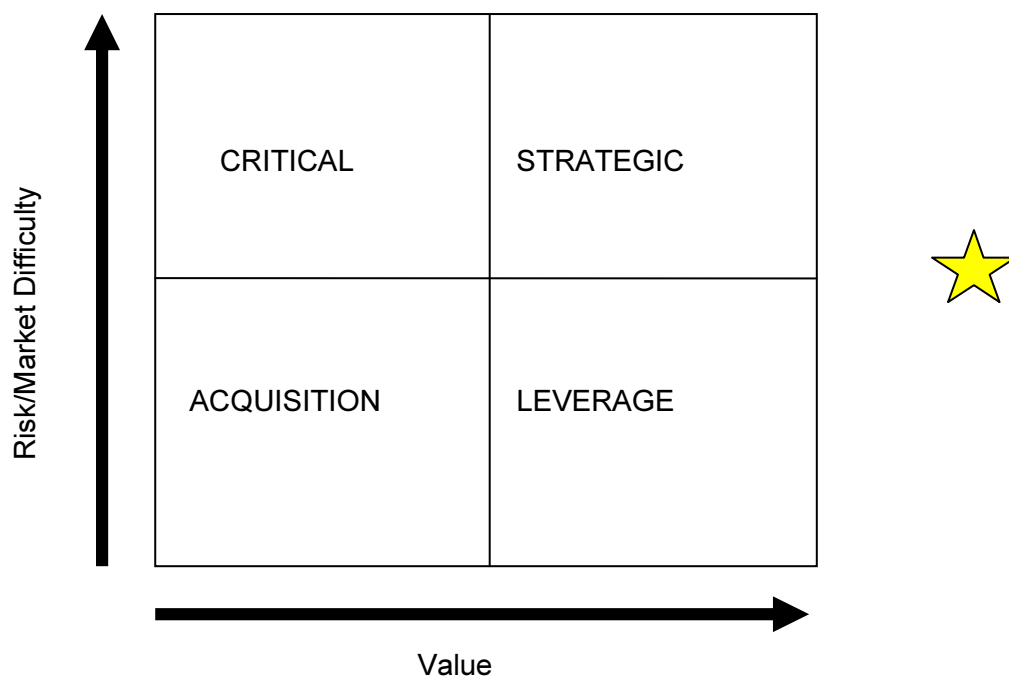
Current Supply arrangements:

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

Appendix B

Market Position:

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



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?

Appendix B

*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:

Appendix B

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>

Appendix B

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	

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)