

Procurement Assessment



Background

In a meeting between West Berkshire and IESE on 23 April 2010, IESE was asked to conduct a health check of the procurement function in West Berkshire. This document sets out in more detail the process we envisage to be followed and the information we would like to receive.

Objectives

- Assess general procurement situation in West Berkshire
- Highlight areas/opportunities for savings
- Highlight areas/opportunities for improvement and reduction of risks.

Process

The assessment aims to follow the following process:

1. Preparation / desk research: at this stage IESE will ask for information and documentation as set out below to help give an understanding of the procurement situation and where possible opportunities may be found.
2. Assessment / Interview: at this stage IESE aims to visit West Berkshire to conduct a number of interviews with key personnel involved in procurement. These interviews will be used to find out more detail and ensure views and experience from staff is taken into account. The information will be compared with and used in addition to the information gathered in phase 1. The exact interview questions will be produced when we have received the information in stage 1. Interviews are expected to last between 1 and 2 hours.
3. Conclusion / Report: at this stage IESE will produce a report that will be sent to West Berkshire and we will present our findings in a formal presentation.

Information requested for stage 1

To enable IESE to get a good overview in the situation in West Berkshire and to help inform stage 2 and 3, we would like to receive the following information for stage 1:

Strategy & Organisation:

- Copy of your Procurement strategy
- Copy of your Organisational structure and the place of procurement

- Copy of a role description of the Procurement department if available (e.g. advisory, operational)

Staff:

- Number of staff and number of people in formal procurement role if available
- Procurement levels of staff (junior, senior etc) and training staff has received
- Overview of other departments involved regularly in procurement activities (e.g. legal) and how they are involved

Performance:

- Overview of Contracts register, including which frameworks are used.
- Spend data *
- Procurement risks identified in corporate risk register and mitigating actions
- Procurement work plan
- Any savings made from procurement in 09-10 and previous years (08-09 & 09-10)
- Performance management system used in assessing procurement staff and in contract management

(to use SpikesCavell data if possible and ready)*

Process & Systems:

- Copy of your Contract Standing Orders / Financial Standing Orders
- Information on what Electronic Procurement platforms (E-P) are used (e.g. E-tendering, E-invoices, E-auctions).

Preparation for stage 2

IESE would like a list of key procurement contacts (both procurement staff and staff in other departments – including job titles). From this, we would like to suggest a number of staff to be participating in interviews for stage 2. Please also highlight key staff that you would like us to speak to as part of this process. Once a number of staff have been selected, we hope you could provide us with some dates suitable for stage 2 interviews. We hope you can facilitate the coordination of interviews on the same day or at least over a limited number of days.

Contact

If you have any further questions on the above, please contact:

Elmer.bakker@southeastiep.gov.uk

Or:

Steve.dunkerley@southeastiep.gov.uk