

# Project Management & Procurement Team Plan 2019/2020

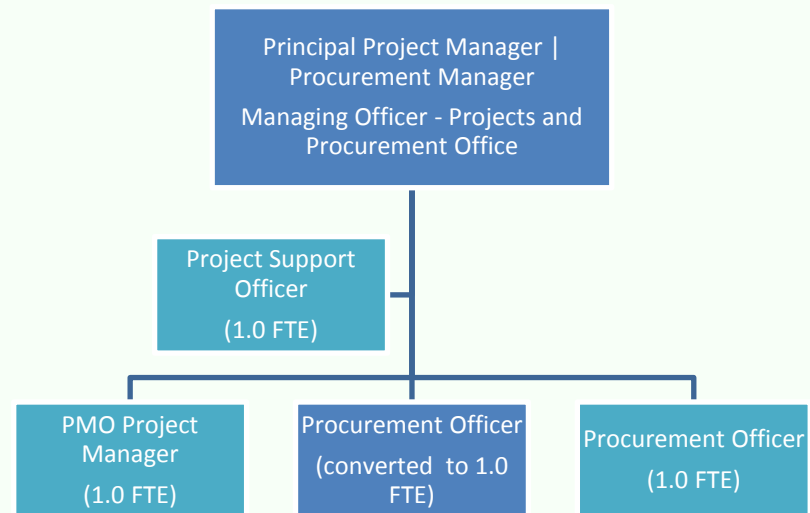
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### Section 1: PMO & Procurement Team's structure:



**Committee(s): Corporate Management Committee (PMO to provide corporate project updates; Procurement Office to seek approval for Procurement spend)**

## **Section 2: Project Management and Procurement Team overview**

### **Corporate Services Business Centre**

The Projects and Procurement Office sits within the Corporate Services Business Centre. The other teams within the Corporate Services Business Centre are Commercial Services, HR, and the Corporate Office (Corporate Strategy and Business Planning, Performance Management, Business Continuity, Emergency Planning, and Corporate Risk Management, Economic Development inc. infrastructure, Corporate Communications, Corporate Policy)

### **Procurement Office**

Prior to May 2018, procurement had been devolved to the Buying departments with a part-time resource which was advisory in purpose only, at the centre. The central resource was 20 hours per week.

The central Procurement Office has since been newly established within the Council to ensure that purchases for the supply of goods/ works/ services are achieved in accordance with the Council's Contract Standing Orders and the Public Contract Regulations (PCR) 2015.

The Procurement team will engage directly with Buying managers across the Council's functions to lead on high value and complex procurement exercises and advise on lower value tenders and quotes, ensuring compliance with procurement practises and relevant legislation.

0.5 FTE Procurement Manager

1.0 FTE Procurement Officer (start date August 1<sup>st</sup> 2018)

1.0 FTE Procurement Officer (start date September 10<sup>th</sup> 2018)

### **Project Management Office**

The Project Management Office (PMO) is a new unit within the Council with responsibility for embedding a Project Management approach across the organisation to support, monitor and report on the progress of projects within the Council's Project Portfolio.

The team will support a wide range of projects by acting as Project Manager on assigned projects, taking responsibility end to end for successful project delivery or by supporting the Project Manager per se with preparation and maintenance of project documentation throughout the project life cycle.

0.5 FTE Principal Project Manager

1.0 FTE Project Manager (start date September 17<sup>th</sup> 2018)

1.0FTE Project Support Officer (start date July 1st 2018) – works across both Project Management and Procurement providing administrative support in both areas

### **Key Team statistics/volumes (optional):**

#### **Procurement Office**

Procurement Needs Analysis was conducted in Nov 2017 to identify contracts that are approaching end dates and new procurement needs forecast for 2018 and 2019:

<b>Contract Value banding</b>	<b>Count</b>
<b>30-100</b>	<b>24</b>
<b>&gt;100K</b>	<b>25</b>
<b>OJEU</b>	<b>15</b>
<b>Grand Total</b>	<b>64</b>

By Mar 2020 the organisation needs to complete 64 procurement exercises which require competitive tenders rather than quotes

24 are between 30-100K and will need advisory support from the Procurement Office

40 are >100K with 15 of this >OJEU thresholds adding to the complexity and procurement process. These are led by the Procurement Office on behalf of the Service areas and run as projects in their own right.

Procurement Needs Analysis is reviewed on a monthly basis within the team and is an exercise with Service Heads on annual basis running in parallel to the Business Planning cycle.

## Project Management Office

30 Project Managers from across the Council have attended the new Project Management training during May – July 2018  
Aim for training sessions to run quarterly or as required

### Project Portfolio for 2018/19:

Type/ Tier	Number
<b>Project</b>	<b>29</b>
A1	9
A2	4
B	11
C	5
<b>Review</b>	<b>11</b>
1:1	11
<b>Grand Total</b>	<b>40</b>

The PMO supports a wide range of projects by acting as Project Manager on assigned projects, taking responsibility end to end for successful project delivery or by supporting the Project Manager per se with preparation and maintenance of project documentation throughout the project life cycle.

In addition, monitoring of progress against baseline timelines for agreed projects is undertaken by the PMO.

**Section 3: Key drivers/influences for the Team** This section should identify the key internal and external drivers which could influence your Business Centre/Team. The identified drivers/influences should then be considered before setting your Business Centre/Team objectives in Section 5.

Drivers and influences		
Internal drivers/influences		
<p style="text-align: center;"><b>Key corporate drivers/influences</b></p> <ul style="list-style-type: none"> <li>• The Corporate Business Plan is trying to achieve against the following themes:               <ul style="list-style-type: none"> <li>- Supporting Local People</li> <li>- Enhancing Our Environment</li> <li>- Improving Our Economy</li> <li>- Organisational Development</li> </ul> </li> <li>• Corporate Key Performance Indicators.</li> <li>• There is a need to increase income generation to offset growing costs and loss of government grants.</li> </ul>	<p style="text-align: center;"><b>Key drivers/influences of any Business Centre/Team strategies/key documents</b></p> <ul style="list-style-type: none"> <li>• Corporate Business Plans</li> <li>• Council’s Constitution</li> <li>• Business continuity plan</li> <li>• Project Management toolkit</li> <li>• Procurement toolkit</li> </ul>	
External drivers/influences		
<p style="text-align: center;"><b>Key community/consultation drivers/influences (if applicable)</b></p> <p style="text-align: center; font-size: 1.2em;">N/A</p>	<p style="text-align: center;"><b>Key partner’s / supplier’s drivers/influences (if applicable)</b></p> <ul style="list-style-type: none"> <li>• Change in risk rating of companies that we may already or in the future contract with</li> <li>• Engaging with SMEs</li> <li>• Ensuring the local economy</li> </ul>	<p style="text-align: center;"><b>National key drivers/influences (if applicable)</b></p> <p>National Procurement Strategy for Local Government in England 2018</p> <ul style="list-style-type: none"> <li>• Incorporating social value in contracts</li> <li>• Ensuring value for money</li> </ul> <p>Local government transparency code 2015</p>

## Section 4: Planned work

After considering all the key drivers/influences impacting on your Business Centre/Team (Section 3), and any general opportunities or improvements required, please classify your planned work into the classifications below (creating/deleting rows as required).

Key:  Project  Review  One-off Activity\*  New Business As Usual  Business As Usual

**\*N.B. One-off Activity refers to an activity that is needed as a one-off but is not a project or a review e.g. writing a new policy/strategy or undertaking recruitment.**

Projects				
Ref.	Project name <i>(N.B. Detailed objectives, deliverables and risks can be found in Project Charters)</i>	Team/section leading on the project	Outcome(s) i.e. the benefit(s) the project brings once delivered	Completion date or stage at the end of the year (March 2020)
1	Procurement of corporate IT systems	Procurement Office and IT	Determine procurement strategy and timeline Produce specification and requirements for all corporate IT systems in preparation for tender Run procurement exercise to appoint a supplier of corporate IT systems	Advertise opportunity by Mar 2020
2	<i>Projects TBD as assigned from the project portfolio</i>			
	<i>N.B. Outputs from Corporate Reviews may also result in new projects</i>			

**N.B. Any objectives should be as ‘SMART’ as they possibly can be.**

<b>Reviews</b>				
<b>Ref.</b>	<b>Objective</b>	<b>Team/section leading on the review</b>	<b>Outcome(s) i.e. the benefit(s) the objective brings once delivered</b>	<b>Completion date or stage at the end of the year (March 2020)</b>
3	Evaluation and implementation of Project Management software to support document management, tracking and reporting including progress dashboards	PMO and IT	Evaluate current systems (document management system, asset management system); Sharepoint, other available systems to select and implement best solution for Council	Review completed by Aug 19 and any growth bid identified for 20/21
4	Review procurement and contract compliance in areas of the Council nominated by the CE to identify areas of improvement and devise associated action plans	Procurement	Ensure procurement and contract compliance	2 areas completed by Mar 2020
5	Full review of CSOs and toolkits for project management and procurement to ensure continued fit for purpose	Procurement PMO	Ensure documentation and templates remain fit for purpose and beneficial to the organisation	Dec 2019
6	Evaluate e-procurement system for additional functionality	Procurement	Determine if the InTend system is still best value and most effective system for the Council/ SPG	

**One-off Activity**



Ref.	Objective	Team/section	Outcome(s) i.e. the benefit(s) the objective brings once delivered	Completion date or stage at the end of the year (March 2020)
7	Produce Council's Procurement Strategy and Project Management Strategy (embedding the PMO in the organisation)	PMO and Procurement Office	Establish vision and direction of travel for both new sections	Sept 2019
8	Embed new staff into new work areas and continue to develop the function	PMO and Procurement Office	Establish and raise awareness of role and function of new areas in the organisation	Mar 2020
9	Internal audit of procurement processes	Finance/ Internal audit	Validate procurement processes and identify any areas of improvement	Mar 2020

<b>New Business As Usual</b>				
Ref.	Objective	Team/section	Outcome(s) i.e. the benefit(s) the objective brings once delivered	Completion date or stage at the end of the year (March 2020)
10	Quarterly review with Service leaders to check contract compliance and future procurement needs	Procurement Office	Maintain up-to-date position on procurement need and plan effectively for procurement exercises	
11	Deliver procurement training to Buying Managers and Section Heads on an annual basis and as part of new start induction (as required)	Procurement Office	Ensure understanding of Contract Standing Orders and compliance and knowledge and use of appropriate procurement processes	By May 2019 and annually on update of Constitution

12	Set-up and embed a project management network and community to share best practise and provide opportunities for learning from each other	PMO	Continue to develop and support Project Managers across the organisation	By Dec 2019
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<b>Business As Usual</b>				
<b>Ref.</b>	<b>Objective</b>	<b>Team/section</b>	<b>Outcome(s) i.e. the benefit(s) the objective brings once delivered</b>	<b>Completion date or stage at the end of the year (March 2020)</b>
13	OJEU procurements	Procurement office lead exercises across the organisation	Compliant contracts	Ongoing as required
14	>100K procurements	Procurement office lead exercises across the organisation	Compliant contracts	Ongoing as required
15	Procurement training – as part of staff training	Procurement	Improve knowledge and skill sets across the organisation	Ongoing as required
16	Project Mgmt training – as part of staff training programme	PMO	Improve knowledge and skill sets across the organisation	Ongoing as required
17	Working in projects training – as part of staff training programme	PMO	Improve knowledge and skill sets across the organisation	Ongoing as required
18	Project monitoring and reporting	PMO	Inform CLT and Members of progress of project portfolio	March; June; Sept; Dec to fit Cttee schedule
19	Review and prioritise resources to support the project pipeline	PMO	Review and revise project pipeline and agree portfolio by synchronising with Business Planning cycle	Sept 2019 and March 2020

## Section 5: Project and Procurement Team’s requests for growth

Please list below any requests for growth for the 2019/20 year.

Following a review of all growth requests by CLT on Oct 16<sup>th</sup> 2018, the following were determined to be aspirational at this moment and so are not being recommended for consideration by CMC at this time.

Description	Linked objective/project	Amount requested	Business case completed? (Not always relevant – if unsure CE to determine. If yes – attach with this plan)	CLT Decision Classification
<b>Additional e-procurement system functionality to support contract management and compliance</b>	6	Unknown at present TBD £15,000 placeholder	TBD	On hold
<b>Project Management software to support document management, tracking and reporting including progress dashboards</b>	2	Unknown at present TBD £15,000 placeholder	TBD	Category 2 – Highly desirable but on hold

**Section 6: Team’s performance indicators** The indicator in green may or may not be applicable. The indicators in black are core Business Centre/Team indicators which should be monitored quarterly. First add any of the Corporate Key Performance Indicators assigned to your Business Centre/Team. After considering the objectives in Section 4 and those associated with your projects, add any other performance indicators you believe will be helpful to monitor progress. You should decide whether it is more appropriate to monitor your Business Centre/Team indicators quarterly, six monthly or annually and set targets to match the frequency. Should there be any desired changes to the description or targets of Corporate Key Performance Indicators then the Corporate Head of Strategy should be informed as early as possible. This document can be used as a monitoring document for the results too if you wish.

Performance Indicator	Target					Actual					Current status	Trend
	Q1 (Apr-June)	Q2 (Jul-Sept)	Q3 (Oct-Dec)	Q4 (Jan-Mar)	Full year (Apr-Mar)	Q1 (Apr-June)	Q2 (Jul-Sept)	Q3 (Oct-Dec)	Q4 (Jan-Mar)	Full year (Apr-Mar)		
<b>Corporate Office</b>												
CO1: Number of formal complaints related to the business team.	0	0	0	0	0							
CO2: Number of decisions investigated by the ombudsman requiring a remedy by the Council.	0	0	0	0	0							
<b>Procurement Office</b>												
PO1: Number of tenders > £100K team has supported to contract award	Baseline this during 18/19 as new section											
PO2: Number of tenders stopped or abandoned due to supplier responses	0	0	0	0	0							
PO3: Number of tenders stopped or abandoned due to Council omissions or failures	0	0	0	0	0							

PO4: Savings made as a result of a retender process	Difficult to provide a target as depends on number and size of procurements in the future											
PO5: Social value gained through the tender process	Social value elements of contracts to be investigated and will be put in place subject to CLT and CMC approval											
PO6: Number of SMEs contracted with	Difficult to measure on a Qly basis as contract term typically > 1Q											
<b>Project Management Office</b>												
PMO1: Number of staff trained in Q on Project Management methodology	6	6	6	6								
PMO2: Number of projects that the PMO is engaged with	Baseline this during 18/19 as new section											
PMO3: Number of corporate projects that PMO provide updates to CLT/ CMC	Baseline this during 18/19 as new section											

## Section 7: Summary of the Xx Business Centre/Team's contribution to Corporate Business Plan themes

This section should demonstrate how the Business Centre/Team is supporting the Corporate Business Plan by inserting the reference numbers in Section 4 under their most relevant Corporate Theme. If it supports more than one Corporate Theme but not all the Corporate Themes, it should be inserted under the PRIMARY Corporate Theme. If it supports all the themes e.g. areas with a corporate remit, the reference number should be added to the last row of the table.

Priority	Supporting Local People	Enhancing Our Environment	Improving Our Economy	Organisational development
Reference number				1,4,5,6,7,8,9,10,11,12
<b>Supports all Corporate Themes</b>				
Reference number	2,3			

## **Section 8: Risk management (excluding project risks with separate Project Charter)**

*This section has been redacted*