Community Benefit in Procurement Network

24th Sept 2014
Agenda

• Introduction
• Sustainable Procurement  
  Phil Duddell
• Innovative Approaches to Community Benefit  
  Siân Morris
• CITB – Employability and Skills Support  
  Vanessa Gallant
• CBCs - contractor’s Perspective  
  Amey
• Update on recent developments  
  Robin Fallas & Pauline Graham
• Roundtable
Sustainable Procurement
from ‘the Act’ → to embedding

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Community Benefits in Procurement Champions Network
The Scottish Model of Procurement

• In April 2014, the Scottish Procurement reform agenda entered its third phase, moving from a ‘government-led, public sector owned’ approach to a truly collaborative partnership approach with the business, third and public sectors.

• The Scottish Model of Procurement supports the Government’s National Purpose of sustainable economic growth – a simple concept looking at sustainable outcomes; it recognises the strategic importance of procurement as a key enabler, seeking to deliver the maximum economic benefit from every public pound we spend.
Procurement Reform (Scotland) Act 2014

8 General duties
(2) A contracting authority must also comply with the sustainable procurement duty.

9 Sustainable procurement duty
(1) For the purposes of this Act, the sustainable procurement duty is the duty of a contracting authority
(a) before carrying out a regulated procurement, to consider how in conducting the procurement process it can
(i) improve the economic, social, and environmental wellbeing of the authority’s area,
(ii) facilitate the involvement of small and medium enterprises, third sector bodies and supported businesses in the process, and
(iii) promote innovation, and

(b) in carrying out the procurement, to act with a view to securing such improvements identified as a result of paragraph (a)(i).

(2) The contracting authority must consider under subsection (1) only matters that are relevant to what is proposed to be procured
and, in doing so, consider the extent to which it is proportionate in all the circumstances to take those matters into account.

(3) In this section—
“small and medium enterprises” means businesses with not more than 250 employees,
“third sector bodies” means organisations (other than bodies established under an enactment) that exist wholly or mainly to provide
benefits for society or the environment.

Requirement to produce a Corporate Procurement Strategy, that includes environmental and socio-economic outcomes, and report on delivery against this annually
Risks and Opportunities and National Outcomes

- Link to Single Outcome Agreements / Service Level Agreements
- Links to reporting requirements of all public sector bodies in Scotland
- Reflect the reporting requirements of the Procurement Reform (Scotland) Act 2014
- Scotland Strategic Objectives → National Outcomes and Indicators → Organisational Policy Objectives → Procurement Issues
Delivering the sustainable procurement ‘Golden Thread’

1. International and national laws, policy priorities and commitments (Scotland Performs)
2. Organisational frameworks, policy priorities, commitments and targets
3. Procurement strategies, action plans and targets
4. Projects, Products & services
5. Corporate Procurement Strategy, Prioritisation Methodology (Procurement Reform (Scotland) Act 2014)
6. Sustainability Test
   - Product and Supplier Selection
7. Flexible Framework – internal assessment of performance
8. PCA external validation of performance
Testing, testing.....

- A. Flexible Framework
- B. Prioritisation Methodology
- C. Sustainability Test
- Statutory Guidance
- Beta testing of Tools

Flexible Framework, Prioritisation Methodology – foundations for delivery of Act requirements (and beyond)
Beta Testing of Tools

- Testing to ensure that tools are ‘fit for purpose’
- Across all sectors of the public sector in Scotland:
  - Scottish Government
  - Local Government
  - Higher Education / Further Education
  - Health
  - NDPBs
  - Suppliers
  - Feedback to fine tune the tools
  - Supporting implementation of the Procurement Reform (Scotland) Act 2014
A. Flexible Framework

Develop a Scottish version of the Flexible Framework with supporting guidance to assist organisations progress through the stages taking into account:

• how each statement in the matrix should be interpreted for a cross section of public sector organisations;
• revisions to the statements within the matrix to reflect national policy;
• guidance on what organisations are expecting to have achieved to demonstrate meeting a particular level; and
• support guidance to encourage continuous improvement through the Procurement Capability Assessment (Performance).

Testing – views on structure, questions, guidance, whether participants can add any relevant guidance/ examples of good practice
Flexible Framework and ‘the Cloud’

Procurement Capability Assessment

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Organisation’s Action Plan
- Action
- Responsibility
- Target Date

Procurement Reform Act:
- Corporate Procurement Strategy
to take account of economic, social and environmental wellbeing

Procurement Journey

Law & Regulations
Policy & SPPNs
Guidance
Tools

The Scottish Government
Riaghaltas na h-Alba
B. Prioritisation

• Procurement Reform (Scotland) Act 2014
  – New requirements
  – Development of new prioritisation tool to reflect links to National Performance Framework - National Outcomes & Indicators

• Changes to procurement landscape – local government / health and social care

• Climate Change Act - The toolkit and supporting guidance are also in line with guidance on legislation and regulation, such as the Climate Change Act 2009, in that it “...also has regard to proportionality: what is expected of public bodies should be a reflection of their impact and influence, as well as the nature of what they do, in order to balance proportionality and flexibility with effectiveness and delivery.”

• Links to PCA process
Prioritisation

- Links between Prioritisation and:
  - Flexible Framework
  - Effectively using its Results
  - Development of Frameworks & Contracts

Policy objectives → Prioritisation → Commodity strategy

Frameworks & Contracts → Sustainability Test

Informs: Category/Commodity Strategy/Market engagement

Informs: Organisational procurement priorities e.g. Community Benefits

Enables: early engagement and consideration with key stakeholders – not just procurers
Prioritisation

- Reflects:
  - Spend
  - Environmental and socio-economic risks and opportunities
  - Scope to do more to mitigate risks and capture opportunities
  - Influence over the market
- Level:
  - High Commodity Level
  - Sub-commodity
- Informs:
  - Commodity Strategy
  - Market engagement
  - Organisational priorities
  - Subsequent development of contracts & frameworks
- Format:
  - Excel, macro enabled
  - Flow process
  - Graphical and summary outputs

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C. Sustainability Test

• Use:
  – Development of contracts and frameworks

• Reference:
  – Prioritisation results
  – Commodity Strategy

• Guidance:
  – Embedded guidance on how to embed relevant and proportionate requirements

• Format:
  – Excel, no macros
  – Flow process
  – Summary of relevant risks and opps for contract and guidance on how to apply
Prioritisation - Sustainability Test - National Performance Framework – Outcomes – Reporting

(Extract from guidance within Prioritisation Methodology)

- Community Benefit Outcomes and Indicators
- Community Benefits organisational objectives
- Community Benefits procurement objectives
- Community Benefit requirements
- Community Benefits & National Outcomes achieved
Questions?

Thank you

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Community Benefits in Procurement Champions Network
East Lothian Council – Innovative Approaches to CBC

Siân Morris
Client-Based Approach

Presentation by
Vanessa Gallant– Strategic Partnership Adviser
What is the Client-Based Approach?

- Guidance to assist public sector procuring bodies to embed employment & skills outcomes contractually in procurement

Where did it come from?

- National Skills Academy for Construction (NSAfC) is an employer-led initiative which funds projects to help meet the future demands of the industry
- Project becomes a live training academy that benefits industry and the local community
- Data reported from these projects have informed the client-based approach benchmarks
What’s in it for Me?

Client

• Able to meet increasing requirements from Government to deliver jobs and training through procurement
• Template clauses, benchmarks & evidence requirements to simplify the process of embedding community benefits in procurement
• Greater accountability for public spending with good PR opportunities
• Better trained workforce improves efficiency and saves time and money
• Economic development for the local community to help create sustainability
What’s in it for me continued.....?

CITB-ConstructionSkills

• Fulfils our remit as a sector skills council
• Attracts new talent into the industry
• Workers and managers are up-skilled to meet the future needs of the industry

Contractor

• Confidence outcomes set are realistic & achievable for the size/type of project being procured
• Creates a level playing field – no blind bidding as all are factoring in the same outcomes
• Recognition for delivery of wider employment and skills activities not just new entrants
• Early engagement of supply chain to ensure their support with delivery
• Good PR
• Evidence to support future tendering opportunities

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Employment & Skills Areas

New Entrants
1. Work placements 14-16 years
2. Work placements 16 + years
3. Construction Curriculum Support Activities
4. Graduates
5. Apprentices – existing
6. Apprentices - project initiated
7. Apprentices - completions

Employment
08. Jobs Created on Construction Projects

Existing Workforce
09. S/NVQ Starts for Subcontractors
11. Training Plans for Subcontractors
10. S/NVQ Completions for Subcontractors
12. Supervisor Training for Subcontractors
13. Leadership and Management Training for Subcontractors
14. Advanced Health and Safety Training for Subcontractors
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</table>
Example Method Statement Selection

- Method statements should include a description demonstrating how you intend to deliver the KPIs listed.
- It’s important to list all partners involved in the delivery to demonstrate your ability to fulfil the commitments.

Overview
As Major Contractors we are committed to the delivery of the outcomes and will engage with our supply chain to assist us in the delivery of the KPIs. We will brief our supply chain on the proposed delivery and monitoring methods as set out below both at project outset and at regular intervals during the build, their commitment to delivery will also be made contractual via supply chain agreements. We will engage with partners who are able to support delivery prior to the project commencing and these include:

- List all of the local partners involved who you will engage with to support the project.

Apprentice Starts
We are keen to recruit redundant apprentices to allow completion of apprenticeships for individuals unfortunate enough to be made redundant part way through their training. We will request that any contractor on site who has an apprentice vacancy considers redundant apprentices as part of their recruitment process. We will signpost any contractors with apprentice vacancies to both CITB (for advice on any funding that may be available and assistance with locating redundant trainees in relevant trades if required) and the identified local employment vehicle (name here). We will also make sub-contractors aware of the current Skills Development Scotland funding for ‘Adopting’ an Apprentice as well local initiatives who are able to support with recruitment such as (list the partners and initiatives who you will engage with here).

- Numbers of new start apprentices and evidence will be gathered through the monthly monitoring form.
Monitoring

- **SPONSA** – ‘Skills Plan of the National Skills Academy’ online performance monitoring tool

<table>
<thead>
<tr>
<th>Programme Target</th>
<th>Y1</th>
<th>Y2</th>
<th>Y3</th>
<th>Y4</th>
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<tbody>
<tr>
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<td>Duration: 37 Months</td>
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<table>
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<tr>
<th>Client Based Approach (2011)</th>
<th>Y1</th>
<th>Y2</th>
<th>Y3</th>
<th>Y4</th>
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<tbody>
<tr>
<td>Work Experience Placement (16-19 years)</td>
<td>24</td>
<td>18</td>
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<tr>
<td>Work Experience 14-16 years (persons)</td>
<td>222</td>
<td>184</td>
<td>34</td>
<td>10</td>
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<td>CBE Diploma Consortia Membership</td>
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<tr>
<td>CBE Diploma Curriculum Development</td>
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<tr>
<td>Graduates - persons</td>
<td>21</td>
<td>6</td>
<td>7</td>
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</tbody>
</table>

- Able to break reports down into individual projects as well as overall programme
- Reports in a variety of formats including figures and bar charts
- Nominated client coordinator is responsible for updating SPONSA
- Free to use once approved

© CITB
CITB employer support post contract award

• **Area Delivery Manager** - Coordinate a package of support available to employers to meet individual project needs

• **Apprenticeship Officer** – Assist with the recruitment of new & redundant apprentices, identify college classes who would benefit from site visits & curriculum support activities

• **Company Development Adviser** – Support the development of training plans, provide advice on training courses and grants available to support the cost

• **Careers Adviser** – Help make links with local schools for curriculum support activities, site visits and work placements

• **Work Placement Coordinator** – engage the CITB pre-vocational project for those aged 16+ to gain work experience (funding is available to employers who participate in the initiative)

• Grants are available to help all construction employers who are registered with CITB whether they’re working on CBA projects or not.

• Support available for community benefit briefings, meet the buyer events and supply chain briefings as and when required by client.

© CITB
Commitment Required from CITB

- Submit an application for approval to National Construction Skills Academy Group (NCSAG) Group

- Complete website template to include client and programme details

- Submit quarterly performance figures for programme to Strategic Partnership Adviser

- Attend biannual face to face reviews with Strategic Partnership Adviser (client premises)

- Complete one case study per year to appear on the website

© CITB
Thank you

Vanessa Gallant– Strategic Partnership Adviser
07767844196
vanessa.gallant@citb.co.uk
CBCs – A Contractor’s Perspective

Amey
Community Benefits - Past, Present & Future

Duncan Moncrieff - Principal Bid Manager
We create better places to live, work and travel

Overview of Amey

We are the faces behind the services you use every day.

Our teams are the people behind the services you use every day – from roads, railways and schools to waste disposal, airports or the energy and water you use in your home.
Overview of our services
Our Strategy

To help create better places to live, work and travel

By 2018

£3bn turnover
Provider of choice
Effective
Data
Driven business

Employer of choice
Collaborative

Create shareholder value

28,000 employees

Zero accidents or harm

Progressive
Accountable
Amey - Our 21,000 People

Age range 16-84

Male/ Female 75/25

Average Tenure 7 Years

Part-time 15%

Graduates 161

Apprentices 217
Amey in Scotland - September 2014

- Amey’s work in Scotland has an annual turnover of over £160m
- We employ over 2000 people
- Amey has the largest highways design capability in Scotland
- We examine over 2,500km of rail network including 13,500 bridges and structures
- We support over 65,000 pupils across nearly 80 schools for six local authorities
- We support over 20m passenger journeys across three airports.

Clients include:
- Scottish Water
- Scottish Power
- SSE
- Glasgow, Aberdeen and Edinburgh airports
- North Lanarkshire Council
- Glasgow City Council
- M8 New Works Design – Ferrovial Lagan
- M8 DBFO – Scottish Roads Partnership
- Transport Scotland
- Network Rail
- DIO
Emerging Talent Programmes

- 2/3 year on the job training programme
- Vocational College qualification
- Duke of Edinburgh's Gold Business Award
- 3 levels - Intermediate, Advanced & Higher
- We operate over 35 Apprenticeship Frameworks e.g. Highways, HR, Civil Engineering, IT & Customer service

Emerging Talent - Entry Level Programmes

**Apprentices**
- 2 year programme within a specified role
- Developing the technical specialists of the future
- Minimum 2:1 degree
- Will gain a relevant professional qualification

**Graduate Pathways**
- 2 year programme working across the business
- Developing the Operations Managers and Business Manager of the future
- Three placements – Commercial, Operational & Bidding/Project Management
- Minimum 2:1 degree

**Management Graduates**
Why Invest in Emerging Talent?

• We need to create fresh talent pools to ensure the right people, with the right skills, are in the right roles, at the right time.

• We need to address employee demographic concerns - ageing workforce, retirements, future skills, diversity, and scope of projects.

• We need to meet our commitment to maintaining 3% of the workforce on a recognised Emerging Talent Programme which is a key part of our bidding proposition.

  > 2014: 400 new recruits [230 Apprentices and 170 Graduates]
  > 2015: 350 new recruits [250 Apprentices and 100 Graduates]

• To help address the market concerns that there will be a shortfall in critical skills (Engineering/Technology).
Community Benefits - The Past

• Back in 1996 – Energy PFI Projects
• Back in 2000 to 2005 – Scottish NHS & Schools Projects
• Back in 2005 to 2010 – NHS LIFT & BSF
• Back in 2010 – Scottish HUB Initiative
• 2012 to Date – Major Infrastructure Projects
Community Benefits - Present

- Can be up to 10% of the Evaluation in Bid Submissions, typically covering:
  - Targeted Recruitment & Training
  - SME & SEO Development & Supply Chain
  - Social & Environmental Awareness
Targeted Recruitment & Training

Main Focus

- Recruiting Young People.
- Helping the Long Term Unemployed by working with Local Agency's.
- Ex-Offenders.
- MOD
### Targeted Recruitment & Training

<table>
<thead>
<tr>
<th>Maximising Employment &amp; Training</th>
<th>Employment Opportunities &amp; Job Creation</th>
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</thead>
<tbody>
<tr>
<td>• Schools</td>
<td>• Supply Chain Partner Involvement &amp; Control</td>
</tr>
<tr>
<td>• Students</td>
<td>• Construction Phase</td>
</tr>
<tr>
<td>• Apprenticeships</td>
<td>• CI TB &amp; Direct</td>
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<tr>
<td>• Graduates</td>
<td>• Operational Phase</td>
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<tr>
<td></td>
<td>• Amey Apprenticeships &amp; Direct</td>
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<table>
<thead>
<tr>
<th>Formal &amp; Informal Training</th>
<th>Delivery of Community Benefits</th>
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</thead>
<tbody>
<tr>
<td>• Job Specific Training</td>
<td>• Business &amp; Community Manager</td>
</tr>
<tr>
<td>• On-going Training &amp; Development</td>
<td>• Community Benefits Plans &amp; Reports</td>
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<tr>
<td>• Career Path Framework</td>
<td>• Monitoring Community Benefits</td>
</tr>
<tr>
<td>• Amey Academy</td>
<td></td>
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<tr>
<td>• Performance &amp; Development Reviews</td>
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</tbody>
</table>


SME & SEO Development & Supply Chain

Subcontracting to SME’s & SEO’s
- Raising Awareness
- On-going Support
- Working with SEO’s
- Promoting Staff Engagement

SME & SEO Opportunities
- Pre-Advertisement Activities
- Awareness Raising Events
- Utilising Local Media
- Prospective Candidates Support

Business Mentoring for SME’s & SEO’s
- Support & Advise
- Meet the Buyer Events
- SME Workshops
- SEO Workshops
- One to One Support to SMEs & SEO’s

Outcomes
- Economic & Social Development Impact
  - Third party income
- For Every £1 Spent £1.67 Value Added
Social & Environmental Awareness

Business & Community Manager
- Community Liaison
- Responses to Complaints
- Statutory & Policy Requirements
- Commercial Management Issues

Education & Communications Manager
- Media Liaison & Project Website
- Best Practice - Educational Facilities
- Education & Visitor Centre
- School & Group Visits

Wider Community Relations
- Amey Foundation
- Community Involvement Days
- Local Initiatives

Environmental Initiatives
- Responsible Sourcing
- Efficient Use of Materials & Resources
- Awareness of Sustainable Development
Community Benefits

The Future - ?
Traditional Career Model

- Family
- Individual
- Schools
- Local Authority
- Higher Education
- Further Education
- Employer
Traditional Career Model Problems

• Expectation by the individual’s Family that Further and Higher Education was the route to a ‘Better Job’ rather than joining an Employer from School.

• Many individuals having no visibility of the qualifications that they would need to have when leaving Secondary School as at that point in time they may not have a clear vision of what they want to do.

• Many individuals not aware what is expected of them before taking up an Apprenticeship Place with an Employer.

• Individuals leaving Further and Higher Education with Qualifications that do not fit with prospective Employers requirements for their business.

• Employers interviewing candidates who do not have any exposure to their business or values.

• School, Further Education, Higher Education leavers not able to secure full time employment in their local marketplace.
R2 – Local Authorities, SDS and Employer Organisations to work together to produce better Careers Guidance.

R3 – Education Scotland and Employer Bodies to work together to produce a modern standard for Work Experience.

R11 – A Key Focus is Employability and *Education Scotland must work closely with Business Organisations* and its Members to understand Industry’s needs.

R14 – Scottish Government to support the creation of Regional Industry Led Youth Groups and facilitate engagement between Employers and Education.

R15 – Businesses should enter into 3-5 Year Partnerships with Secondary Schools, every Secondary School and its feeder Primaries should be supported by at least one Business in a long-term Partnership.
Sir Ian Wood Report Recommendations

R16 – Scotland Leading Industry Sector Groups and Companies should be encouraged to work with the Scottish College for Educational Leadership to develop a Programme targeting School Staff Leaders to develop their understanding of Industry and Careers.

R17 – Employers and National Industry sector Groups should form Partnerships with Regional Colleges to ensure that course content is Industry relevant and full advantage is taken of Work Based Learning and Employment Opportunities.

R22 – Procurement and Supply Chain Policies in both the Public and Private Sector should be applied to encourage more Employers to support the development of Scotland’s Young Workforce.
Community Benefits - The Future

- Education Scotland
- Skills Development Scotland
- Further Education
- Local Authorities
- Amey
- Secondary Schools
- Higher Education
- Scottish College of Educational Leadership
- Primary Schools
Community Benefits - Past, Present & Future

Duncan Moncrieff - Principal Bid Manager
Recent Developments

Robin Fallas

&

Pauline Graham
CBiPS

Final Q&A
Next Meeting
Provisionally Tues 13th Jan
Glasgow