

Local Community Wealth Building

Action Plan

How will we deliver this theme?	We will do this by:	Target date
<p>We will be explicit in our expectations of suppliers in meeting our Local Community Wealth objectives and we will seek commitments from them through the procurement process.</p>	<p>Updating our tender documentation to capture more information about the local benefits that will be delivered as part of our contracts.</p>	<p>By January 2023</p> <p>UPDATES:</p> <p>November 2022 - Where relevant, tender evaluation criteria is specifically tailored to require suppliers to set out the local benefits that the delivery of the contract will bring. For contracts that are managed using the council's contract monitoring system, the commitments are captured and monitored to ensure the successful delivery of the commitments made. Where a contract is managed outside of the system, the commissioner is required to implement appropriate processes to monitor the delivery of the local benefits.</p> <p>April 2023 - The council's tender documentation has been updated to require suppliers to inform whether they are a Category 1 or Category 2 supplier. This information has been collected for all contracts awarded via open market competition/framework agreement call off from 1 April 2022 and will be routinely collected for all contracts awarded, including waivers of contract standing orders going forward.</p>

	<p>Working with commissioners to encourage evaluation criteria that clearly sets out what the Council sees as valuable in our local area and seeks supplier commitments that meets the council's corporate objectives.</p>	<p>By December 2022</p> <p>UPDATES:</p> <p>26/11/2022 – workshop delivered to commissioners which explained the strategy, theme and implementation of these. Also available on the learning hub for others to watch.</p> <p>November 2022 - Where relevant, tender evaluation criteria is specifically tailored to require suppliers to set out the local benefits that the delivery of the contract will bring. For contracts that are managed using the council's contract monitoring system, the commitments are captured and monitored to ensure the successful delivery of the commitments made. Where a contract is managed outside of the system, the commissioner is required to implement appropriate processes to monitor the delivery of the local benefits.</p> <p>13/12/2022 - Updated Procurement Initiation Form with guidance about linking social value to corporate plan with example questions that can be included.</p> <p>April 2023 – waiver form has been updated to require commissioners seeking a waiver of contract standing orders to set out the local benefits that their contract can deliver and to demonstrate how these meet the objectives set out in the corporate plan and the procurement strategy.</p>
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	<p>Implementing the findings of the Community Wealth Building work that CLES (Centre Local Economic Strategies) has done with the Council.</p>	<p>TBA based on CLES report.</p>
<p>We will include specific, measurable, realistic and timebound targets that will be used to capture the amount of community wealth being delivered as a result of the Council's procurement activity.</p>	<p>Updating our tender documentation to capture information about the local benefits that will be delivered as part of our contracts in a consistent and meaningful way.</p>	<p>By January 2023</p> <p>UPDATES:</p> <p>November 2022 - Where relevant, tender evaluation criteria is specifically tailored to require suppliers to set out the local benefits that the delivery of the contract will bring. For contracts that are managed using the council's contract monitoring system, the commitments are captured and monitored to ensure the successful delivery of the commitments made. Where a contract is managed outside of the system, the commissioner is required to implement appropriate processes to monitor the delivery of the local benefits.</p>
	<p>Ensuring that where community wealth and social value expectations and criteria has been built into a procurement, we will also include key performance indicators /reporting measures which will require the supplier to report on their progress in</p>	<p>Ongoing</p> <p>UPDATES: November 2022 - Where relevant, tender evaluation criteria is specifically tailored to require suppliers to set out the local benefits that the delivery of the contract will bring. For contracts that are managed using the council's contract monitoring system, the commitments are captured and monitored to ensure the successful delivery of the commitments made. Where a contract is managed outside of the system, the</p>

	delivering the benefits throughout the lifetime of the contract.	commissioner is required to implement appropriate processes to monitor the delivery of the local benefits.			
We will develop reporting processes to capture the number of contracts awarded locally and the amount of spend with local suppliers. The aim will be to see this increase throughout the term of the Strategy as community wealth building activities start to embed.	Developing processes within the procurement and contracts team to collate and report on data relating to local spend (direct and indirect) and local contract awards.	<p>By March 2023</p> <p>UPDATES: March 2023 – Two categories have been created to classify local suppliers:</p> <table border="1"> <thead> <tr> <th>Category</th> </tr> </thead> <tbody> <tr> <td>Category 1 – is a local supplier whose registered office is on the Isle of Wight.</td> </tr> <tr> <td>Category 2 – is a supplier who doesn't fall into the Category 1 classification but who has a local base and is employing local people to deliver the contract.</td> </tr> </tbody> </table> <p>This information is being captured for contracts awarded where the whole life value of the contract is over £25,000 and for contracts awarded via a waiver. The data forms part of the QPMR reporting.</p>	Category	Category 1 – is a local supplier whose registered office is on the Isle of Wight.	Category 2 – is a supplier who doesn't fall into the Category 1 classification but who has a local base and is employing local people to deliver the contract.
Category					
Category 1 – is a local supplier whose registered office is on the Isle of Wight.					
Category 2 – is a supplier who doesn't fall into the Category 1 classification but who has a local base and is employing local people to deliver the contract.					
We will work with anchor institutions to ensure, as far as possible, the adoption of the Community Wealth principles within their organisations.	Implementing the findings of the Community Wealth Building work that CLES (Centre Local Economic Strategies) has done with the Council, which will include work with Anchor Institutions.	TBA based on CLES report.			

<p>We will ensure that our procurement processes are structured in such a way to support the delivery of this theme, where possible.</p>	<p>Promoting the use of Prior Information Notices to engage SMEs prior to the commencement of the procurement process.</p>	<p>Ongoing</p> <p>Prior Information Notices are routinely used by commissioners to give prior notice to the market of our forthcoming contract opportunities. Early market engagement and intelligence gathered during this process is also used to help inform the subsequent procurement process.</p> <p>UPDATES:</p> <p>May 2023 – the Procurement Initiation Form has been updated to educate commissioners on the benefits of issuing a Prior Information Notice and to ask them to confirm whether they want to utilise it as part of their process.</p>
	<p>Being mindful of the way in which we run and structure a procurement, such as breaking up larger contracts into smaller packages of work, so that our contract opportunities are accessible for SMEs.</p>	<p>Ongoing</p> <p>UPDATES:</p> <p>May 2023 – the Procurement Initiation Form has been updated to require commissioners to consider breaking down their contracts into Lots. If they chose not to, justification must be provided.</p>
<p>We will ensure that our procurement documents are streamlined and easy to understand</p>	<p>Reviewing the council’s suite of procurement documents and refreshing the format and language used.</p>	<p>By February 2023</p> <p>This action has not progressed due resource constraints and other priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.</p>

<p>We will ensure that our procurement policy supports the delivery of this strategy theme.</p>	<p>Reviewing Contract Standing Orders to ensure they maximise the benefit to Island-based local partners/businesses to create a cyclical model of community wealth generation.</p>	<p>August 2023</p>
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Climate and Environment Action Plan

<p>How will we deliver this theme?</p>	<p>We will do this by:</p>	<p>Target date</p>
<p>We will be explicit in our expectations of Suppliers in meeting our Climate and Environment objectives and we will seek commitments from them through the procurement process.</p>	<p>Updating the Procurement Initiation Document to be clearer to commissioners on the importance of including climate and environment related evaluation criteria, specification requirements and performance measures. This will include making it a mandatory consideration for every procurement run by the council.</p>	<p>By November 2022</p> <p>26/11/2022 – workshop delivered to commissioners which explained the strategy, theme and implementation of these. Also available on the learning hub for others to watch.</p> <p>December 2022 – The Procurement Initiation Form has been updated to provide additional guidance to commissioners in relation to the council’s climate and environment aspirations and how these can be incorporated in to their procurement process and contract requirements. This is a mandatory consideration and evaluation criteria, specification requirements and contract performance monitoring criteria will be built in to the procurement documents</p>

		<p>where relevant and in a proportionate way.</p> <p>Work in progress -</p> <p>Further work with Climate and sustainability officer has been instigated to see if the document can be further enhanced with signposting/education literature, specialist support for commissioners to maximise the benefits of including climate and environment expectations in the council's procurement process.</p>
	<p>Updating our tender documentation to require tenderers to demonstrate their strategies to reduce carbon in their operations and in their supply chain.</p>	<p>By November 2022</p> <p>UPDATES:</p> <p>December 2022 – The Procurement Initiation Form has been updated to provide additional guidance to commissioners in relation to the council's climate and environment aspirations and how these can be incorporated in to their procurement process and contract requirements, including carbon reduction initiatives.</p> <p>Work in progress -</p> <p>Further work with Climate and sustainability officer has been instigated to see if the document can be further enhanced with signposting/education literature, specialist support for commissioners to maximise the benefits of including climate reduction strategies in a relevant and proportionate way.</p> <p>15/05/23 – The need for further involvement from the council's climate and environment expertise has been</p>

		<p>highlighted to the Climate and Environment Programme Delivery Group for consideration. The relevant officers from the Waste and Environment service will be meeting with the Procurement team to agree a suitable approach to building this into the procurement process. A revised completion date will be set when the meeting has taken place.</p>
<p>We will include specific, measurable, realistic and timebound targets that will be used to capture the activities contributing to the Council's net carbon zero aspirations that are being delivered through the Council's procurement activity.</p>	<p>Ensuring that where climate and environment expectations and criteria has been built into a procurement, we will also include key performance indicators/reporting measures which will require the supplier to report on their progress in delivering the benefits throughout the lifetime of the contract.</p>	<p>Ongoing UPDATES: November 2022 - Where climate and environment expectations and criteria has been built into a procurement, the commitments are captured and monitored to ensure the successful delivery of the commitments made through the council's contract monitoring system. Where a contract is managed outside of the system, the commissioner is required to implement appropriate processes to monitor the delivery of the commitments made.</p>
	<p>Working with the sustainability team and the climate change team to put in place a process for collecting carbon emissions data from Suppliers that are within scope (where they are not already reporting on this information).</p>	<p>By February 2023 UPDATES: 15/05/23 – The need for further involvement from the council's climate and environment expertise has been highlighted to the Climate and Environment Programme Delivery Group for consideration. The relevant officers from the Waste and Environment service will be meeting with the Procurement team to agree a suitable approach to</p>

		building this into the procurement process. A revised completion date will be set when the meeting has taken place.
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Commercial Approach Action Plan

How will we deliver this theme?	We will do this by:	Target date
We will work with Commissioning staff to consider delivery models, route to market and contracting mechanisms.	Working with the commercialisation agenda lead officer to update the Procurement Initiation Document to provide a framework of considerations and options that can help inform their procurements.	By November 2022 UPDATES: This action has not progressed due resource constraints and other priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.
We will promote the Council's Contract Management Framework and Toolkit which has been developed to assist officers in setting robust contract performance monitoring regimes, managing relationships with suppliers and to provide a structure for recording	Promoting the Contract Management Framework and Toolkit through the Vine, Manager's Brief and commissioner network	Ongoing

contract compliance.		
We will continue to develop the Council's Contract Monitoring System which will be a central system whereby the contract	Engaging with commissioners pre procurement to demonstrate the benefits of the system and encourage its use to monitor contract performance.	Ongoing
performance will be monitored, allow the early detection of poor performance which can be remedied quickly in line with the contract arrangements.	Engaging with contract managers to encourage existing contracts to be added to the system.	Ongoing
We will use contract monitoring data to assist with greater strategic planning for contracts that are due to expire, enabling effective options appraisal to be undertaken and new/creative solutions to be identified.	Working with commissioners and contract managers to demonstrate the benefits of using the data in the Contract Monitoring System and develop the use of the reporting aspects of the system.	Ongoing

<p>We will ensure that our procurement policy supports the delivery of this strategy theme.</p>	<p>Reviewing Contract Standing Orders to ensure they are fit for purpose and supportive of this Procurement Strategy, the Commercialisation Strategy and the Corporate Plan.</p>	<p>By August 2023</p>
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Skills and Capabilities Action Plan

	How will we deliver this theme?	We will do this by:	Target date
Staff	<p>We will do this by reviewing and enhancing the training offered to staff involved in procurement and contract management activities and will cover all aspects of the procurement life cycle.</p>	<p>Working with learning and development to add bitesize training packages to the Learning Hub.</p>	<p>By September 2023</p>
		<p>Setting up regular 'drop in' sessions to be set up for commissioners on key procurement and contract matters.</p>	<p>By April 2023 This action has not progressed due resource constraints and other priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.</p>
		<p>Updating the in-house four-day training programme to cover the themes of this strategy.</p>	<p>By February 2023 This action has not progressed due resource constraints and other</p>

		<p>priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.</p>
<p>We will review and enhance the guidance available to staff to assist with procurement and contract management activity. This will have a particular focus on how to deliver the aims of this Strategy and the Council's Corporate Plan.</p>	<p>Creating guidance on climate and environment considerations for Council staff involved in procurement and contract activity to assist them with their understanding of environmental issues and the benefits that it can bring when applied appropriately in a procurement process. This will also include guidance on managing a supplier to ensure delivery of their climate and environment contract commitments.</p>	<p>By April 2023 UPDATES: 15/05/23 – The need for further involvement from the council's climate and environment expertise has been highlighted to the Climate and Environment Programme Delivery Group for consideration. The relevant officers from the Waste and Environment service will be meeting with the Procurement team to agree a suitable approach to building this into the procurement process. A revised completion date will be set when the meeting has taken place.</p>
	<p>Creating guidance on the inclusion of community wealth building and social value criteria into the procurement process</p>	<p>By April 2023 This action has not progressed due resource constraints and other priorities in the</p>

	and the subsequent management of the supplier in relation to their commitments.	Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.
	Creating guidance for Council commissioning staff on the different delivery models, routes to market and contracting mechanisms.	By April 2023 This action has not progressed due resource constraints and other priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.
We will develop training and guidance for sub £25,000 procurement and contract management activity.	Providing templates and guidance for commissioning and contract management staff to use for sub £25k procurements.	By September 2023
	Working with learning and development to create a training module to go on to the Learning Hub for sub £25k procurements.	By September 2023
We will ensure that the procurement and contracts team keep up to date with forthcoming changes to the	Taking advantage of the learning and development programme that will be run by the	TBC – dependent on Cabinet Office timetable

	public sector procurement regime to enable the changes to be implemented successfully.	Cabinet Office to support those operating within the new regime.	
Suppliers	We will do this by reviewing our procurement processes to ensure they are fit for purpose and accessible to SMEs and VCSEs.	Reviewing of Contract Standing Orders to ensure they enable processes that are accessible to SMEs and VCSEs.	By August 2023
		Reviewing stage 1 evaluation criteria to ensure there are no unnecessary barriers to SMEs and VCSEs.	By January 2023 UPDATES: January 2023 – A review has been carried out of the stage 1 evaluation criteria to ensure that there are no unnecessary barriers in the procurement process that would hinder SMEs or the VCS from being able to engage with the council’s procurement processes. It has been concluded that the process is appropriate in its current form. Commissioners are required to ensure that their expectations of suppliers are relevant and proportionate, such as the setting of insurance levels.

		Suppliers have a number of ways that they are able to demonstrate financial standing and experience which is also supportive of SMEs, VCS organisations and new start-ups.
We will develop guidance for Suppliers to help them understand the Council's procurement processes. This will have a particular focus on how they can help the Council to realise this Strategy through the delivery of their contracts for the Council.	Creating guidance on climate and environment to assist Suppliers with their understanding of the Council's aspirations in relation to this theme. This will also include supporting SMEs to develop processes to capture carbon emission data and guidance on activities to reduce their carbon footprint.	By June 2023 This action has not progressed due resource constraints and other priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.
	Creating guidance on Local Community Wealth Building and social value to assist Suppliers with their understanding of the Council's aspirations in relation to this theme. This will include setting out what the Council sees as being valuable locally which will assist Suppliers with their tender submissions.	By June 2023 This action has not progressed due resource constraints and other priorities in the Procurement Team. A revised date will be set in due course when the Procurement and Contracts Manager replacement is in post in June 2023.