

# CIPFA Procurement Benchmarking Club 2018

## IMPORTANT GENERAL GUIDANCE

Guidance and definitions for this questionnaire can be found on the Guidance sheet. Please read this before completing the questionnaire.

Throughout the questionnaire, you can link to the associated definitions and guidance by clicking on Go to Guidance in the top right corner of each section. To return to the questionnaire please click on the Questionnaire tab at the bottom of the window.

Please do not enter any comments or data outside the cells provided or within the return email, as these are processed automatically and your comment will not be seen. If you wish to make any comments, please enter these in the boxes below. Change of contact details should be e-mailed separately to [Benchmarking@cipfa.org](mailto:Benchmarking@cipfa.org).

Please also take note of the unit of the cells below, £'m or £'k

### Comments

This box is here for you to explain local factors that have resulted in unusual figures or to make comments about the questionnaire. This box is restricted to <1024 characters.

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## SECTION A: ORGANISATIONAL EXPENDITURE & BACKGROUND

The aim of this section is to collect data to help organisations understand each other's procurement requirements, provide assistance for organisations interested in collaborative working and provide context to the rest of the data collected.

### A1. Organisational Expenditure

#### (a) Overview of Organisational Expenditure

Go to Guidance -->

	2017-18 Actuals £'m	
	Capital	Revenue
Total Organisational Net Revenue Budget (including employee costs)	..	..
Education & Learning (not schools or children's social care)	..	..
Schools	..	..
Highways and Transport Services	..	..
Social Care and Public Health	..	..
Housing Services	..	..
Cultural, Environmental, Regulatory and Planning Services	..	..
Protective, Central and Other Services	..	..
Support/Back Office Services (including HR, Finance, IT, Customer Services)	..	..
Capital Commercial Spend/Third-Party Spend		..
Revenue Commercial Spend/Third-Party Spend		..
<b>Total Commercial spend/third-party spend</b>		..
		£'m
Total value of invoices paid to third party suppliers with a payment address in your organisation's boundary		..
% of Local Spend		%
		..

#### (b) Position In The Organisation

The individual with lead responsibility for procurement team reports directly to (or is a member of) the organisation's senior management team.

- Select -

There is a board/cabinet member with responsibility for procurement.

- Select -

Please detail where procurement sits within the organisation and the level of the person who the head of procurement reports to.

..

#### (c) Remit of Procurement Manager

Go to Guidance -->

	£'m		
Total commercial/third-party spend (from A1.(a) above)	..		
Of which: Outside procurement manager's remit	..		%
Within procurement manager's remit	..		..

## SECTION B: THE PROCUREMENT TEAM/FUNCTION

The aim of this section is primarily to help members review how their procurement function is managed and provide evidence to support their resourcing strategy.

### B1. The Procurement Function

(a) Staffing Levels
Go to Guidance -->

How centralised is procurement within your organisation?  
(1 = fully decentralised, 5 = fully centralised) Select

How is your Authority's procurement activity managed?  
..

*The number of staff within the central procurement team (presented as FTE) including procurement support staff but excluding Accounts Payable staff, dedicated contract management functions, etc.)*

Full Central Procurement team establishment as per budget at 1st April 2017		FTE	FTE
		£'k	£
Strategic Procurement Activity	..	..	..
Tactical Procurement Activity	..	..	..
Support staff - supplier support	..	..	..
Support staff - e-procurement	..	..	..
Support staff - other	..	..	..

What is the net budget of your central procurement service at 1st April 2017? £ ..

Total Net Cost of the central procurement function as a percentage of the Organisation's Net Revenue Budget % ..

Total budgeted hours for procurement support ..

Budgeted hourly rate for procurement support £ ..

What was the final financial outturn for the procurement service at financial year end? £ ..

Total actual hours of procurement support delivered during the financial year 2017-18 Number ..

Actual hourly rate for procurement support £ ..

Please describe the extent to which procurement work is undertaken outside of the central procurement team i.e. the types of work and staff time involved in performing procurement work in service departments.  
..

**(b) Experience & Relevant Qualifications of Procurement Team**

Provide the FTE breakdown for the staff involved in influencing spend, strategy & management

- MSc/MBA Procurement
- CIPS Graduate Diploma
- NVQ Level 4
- Certificate of Competence (expected to be central government only)
- No procurement qualification

Number of staff currently in active training for a procurement qualification

Experience of running procurement exercises

	FTE	
	<5 years	5 + years
MSc/MBA Procurement	..	..
CIPS Graduate Diploma	..	..
NVQ Level 4	..	..
Certificate of Competence (expected to be central government only)	..	..
No procurement qualification	..	..
Number of staff currently in active training for a procurement qualification	..	

**(c) Training**

Cost of training days that staff involved in influencing spend, strategy & managers received in 2017-18

£	Days
..	..

Please describe your policy/strategy for training and CPD for the team.

..

**(d) Pay Bands**

[Go to Guidance -->](#)

Provide the FTE breakdown for the staff involved in influencing spend, strategy & management

- <£20,000
- £20,000 to £24,999
- £25,000 to £29,999
- £30,000 to £34,999
- £35,000 to £39,999
- £40,000 to £44,999
- £45,000 to £49,999
- £50,000 to £54,999
- £55,000 to £59,999
- £60,000 to £64,999
- £65,000 to £69,999
- £70,000+

Total

FTE
..
..
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**B2. Income From Procurement Services**

**External Income Generated**

[Go to Guidance -->](#)

Did the procurement team generate external income in 2017-18?

- Select -

If yes, how much external income?

£ ..

Describe the sources of external income.

..

## SECTION C: SAVINGS TO ORGANISATIONAL EXPENDITURE

The aim of this section is primarily to help members share their recent experience in delivering savings in order to support procurement managers in deciding in where they should focus their resources.

In addition we collect data on organisations' targets and approaches to help managers review their own processes.

### C1. Savings Targets

Procurement Team Savings Target		Go to Guidance -->
Does your procurement team have a savings target?		- Select -
If yes:		£'k
What was the 2017-18 target?		..
Is this target a "shared target", a "competitive target" or a "split target"		- Select -
How well does your target arrangement work? Does the arrangement result in any conflict of interest with the budget holders?		
..		

### C2. Savings Return on Investment

Central Procurement Service Savings Return on Investment		Go to Guidance -->
Total Net Cost of the Central Procurement Service		£ ..
Total Annual Savings to organisation		£'m ..
Return on Investment ratio		..

## SECTION D: THE PROCUREMENT CYCLE

This section looks at various areas of the procurement cycle.

### D1. Pre-Sourcing Phase/Sourcing Strategy

Tender Threshold	
(i) What is the threshold value at/above which inviting full tenders is required?	£ ..
(ii) Describe your policy for procurement for values beneath the tender threshold (e.g. do you have any other thresholds, number of quotations required etc.).	
..	

## D2. Sourcing Phase

### (a) Sourcing Exercises

[Go to Guidance -->](#)

2017-18

		Number	Annual Value £'m
OJEU tender exercises completed:	Open	..	..
	Restricted	..	..
	Competitive Procedure with Negotiation (CPN)	..	..
	Competitive Dialogue	..	..
	Innovation Partnership	..	..
	Light Touch Regime	..	..
	Sub-total	..	..
			%
Number of contracts awarded where the Organisation completing this return is acting as the lead Procurer on behalf of other Organisations		..	..
Number of contracts successfully challenged under EU procurement regulations as a % of procurements completed within the year		..	..
<b>Annual value of contracts (with CAN) awarded within the year</b>			£'m ..
<b>Total Net Cost of the Central Procurement Function as a % of the annual value of contracts awarded within the year</b>		£ ..	% ..
Total elapsed days between Contract Notice and CAN		Number of elapsed days ..	Average ..
Total number of contract award notices published in OJEU within 30 days of contract award decision		Number ..	% ..

### (b) Frameworks

Use of Pre Arranged Frameworks 2017-18

Use of pre arranged frameworks involving further competition  
 Use of pre arranged frameworks involving direct award  
 Total use of pre arranged frameworks in 2017-18

Number	£'m
..	..
..	..
..	..

What frameworks did you use and did you find these provided good Value For Money?

..

Other tender exercises/competition not listed above

Number	£'m
..	..

Total annual value of contracts awarded between 1st April 2017 and 31st March 2018	£'m	<input type="text"/>
Total Annual Value of Contracts awarded using an eSourcing platform	£'m	<input type="text"/>
Name of software used		<input type="text"/>
Describe your experience of ePurchasing, including the effects of the EU deadline of 100% ePurchasing by October 2018		
<input type="text"/>		

## SECTION E: COMPLIANCE

### E1. Compliance

#### Level of compliance with procurement data requirements of Local Government Transparency Code (2015)

Standard	<input type="button" value="Select"/>
0 Star - Below 1 star standard	
1 Star - Data available on the web (whatever format) but with an open license	
2 Star - As for one star plus available as machine-readable structured data (e.g. Excel instead of an image scan of a table)	
3 Star - As for two star plus use of a non-proprietary format (e.g. CSV and XML)	
4 Star - All of the above plus use of open standards from the World Wide Web Consortium (such as RDF and SPARQL21)	
5 Star - All the above plus links an organisation's data to others' data to provide context	

## SECTION F: SATISFACTION RATING

### F1. Client Satisfaction

#### % of Clients rating their satisfaction with the services provided by the Central Procurement Service as good or better

Total number of feedback forms received between 1st April 2017 and 31st March 2018	<input type="text"/>
Total number of feedback forms received with a rating of good or very good	<input type="text"/>
%	<input type="text"/>

## Comments/Feedback

With each exercise we seek to improve the quality of guidance and definitions supplied in the questionnaire.

Please detail any questions where you felt the guidance was unclear or could be improved.

If you have any comments either about the content or ways we can improve the exercise, please enter here.

Next year we will hope to further improve the content included in this year's exercise.

If there are any questions or areas of audit that you feel we should add to the exercise please specify below.

Example Questionnaire