
Framework of Consultancy Services to Assist Public Bodies in the Development and Implementation of Corporate Procurement Plans.

The framework was established by the National Public Procurement Policy Unit (NPPPU) in the Department of Finance together with a cross-sectoral steering group on foot of an EU compliant tendering exercise.

The Framework is an option for Irish non-commercial public sector bodies to acquire consultancy services to assist in the development and implementation of individual Corporate Procurement Plans as required under the National Public Procurement Policy Framework and the Value for Money circular issued by the Department of Finance in January 2006.

8 consultancy organisations were selected as suitable providers for the purpose of this framework (details overleaf).

The framework covers the supply of relevant services related to the development and implementation of Corporate Procurement Plans. Such services include advice or assistance on:

- **Expenditure analysis to include:**
 - **categorisation of procurement spend and supply positioning,**
 - **supplier analysis, and/or**
 - **transaction/invoice analysis;**
- **Analysis of organisational capacity/competence in respect of procurement activity in the public body;**
- **Development and introduction of Corporate Procurement Plans; and**
- **Initial support in implementing the Corporate Procurement Plan in the public body.**

This document explains how to acquire relevant services from the selected consultants through the framework. Whatever your needs, from a simple review of your completed corporate procurement plan with some advice regarding its implementation to the entire planning and implementation process from the extraction of spend data, through the quantitative and qualitative analysis required, the drafting and agreement of the plan to assistance with its initial implementation, the consultants on this framework are likely to be able to provide such services.

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Consultancy organisations on the Framework

<p>1. Achilles Procurement Services 1 Harmsworth Greenmount Office Park Harolds Cross Dublin 6W</p> <p>http://www.achilles.ie</p>	<p style="text-align: center;">Contact Ms Jeanne Copeland</p> <p style="text-align: center;">Project Director</p> <p> 01 4020111</p> <p> jeanne.copeland@achilles.com</p>
<p>2. Avail Consulting Ltd 87-91 Newman Street London W1T 3EY</p> <p>http://www.tribalavail.co.uk/</p>	<p style="text-align: center;">Contact Mr Joe Stringer</p> <p style="text-align: center;">Engagement Lead</p> <p> 0044 20 7079 9000</p> <p> Joe.stringer@tribalavail.co.uk</p>
<p>3. Deloitte & Touche Earlsfort Terrace Dublin 2</p> <p>www.deloitte.com/ie</p>	<p style="text-align: center;">Contact Mr Cormac Hughes</p> <p style="text-align: center;">Engagement Partner</p> <p> 01 4172592</p> <p> cohughes@deloitte.ie</p>
<p>4. figpc ltd 2 Pinewood Park Drumbo Lisburn Northern Ireland BT27 5LH</p>	<p style="text-align: center;">Contact Ms Florence Gregg</p> <p style="text-align: center;">Managing Director</p> <p> 0044 7834 322 134</p> <p> 048 9082 6522.</p> <p> Florence@figpc.co.uk</p>

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Consultancy organisations on the Framework

<p>5. The HELM Corporation Ltd HELM Ireland 25 Merrion Square Dublin 2</p> <p>http://www.helm-corp.com/supply.asp</p>	<p>Contact Mr Sean Sweeney</p> <p>Senior Partner</p> <p> 01 6618955</p> <p> seans@helm-corp.com</p>
<p>6. IBM Global Business Services Oldbrook House 24-32 Pembroke Road Dublin 4</p> <p>http://www-05.ibm.com/services/bcs/ie/services.html</p>	<p>Contact Mr Gary Holohan</p> <p> 01 8154291</p> <p> gary.holohan@ie.ibm.com</p>
<p>7. PricewaterhouseCoopers LLP Waterfront Plaza 8 Laganbank Road Belfast BT1 3LR Northern Ireland</p> <p>www.pwc.com/uk</p>	<p>Contact Mr Robert McCullagh</p> <p>Partner</p> <p> 0044 28 9041 5714</p> <p> bob.w.mccullagh@uk.pwc.com</p>
<p>8. Purchasing Solutions Ltd 1A Woodlands Office Park Southern Cross Bray Co. Wicklow</p> <p>http://www.purchasingsolutions.ie</p>	<p>Contact Mr Gavan McGirr</p> <p>Managing Director</p> <p> 01 2040070</p> <p> gavan@purchasingsolutions.ie</p>

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Management of the Framework

The **Steering Group**, which comprises representatives of various public bodies and chaired by the National Public Procurement Policy Unit in the Department of Finance, oversees and provides general direction to the management of the framework. The Steering Group is available to highlight and resolve any major issues or problems which arise with the appropriate parties involved in relation to this framework agreement.

The framework will be kept under review to ensure that the providers continue to deliver on their price and performance commitments and that their services continue to be relevant to the Corporate Procurement Planning process. The Department of Finance has reserved the right to request relevant information from time to time from successful providers on the operation of the framework to carry out this review and to assist you in getting the most out of the framework.

If you have any questions on how to use the framework, please consult this User Guide in the first instance or contact the NPPPU:

	Pat Leahy	John Kinnane
	(01) 639 6252	(01) 639 6230
	pat.leahy@finance.gov.ie	John.kinnane@finance.gov.ie

What can you buy through the Framework?

The short answer is that you can acquire any package of consultancy services relevant to the corporate procurement planning process. Each provider is in a position to provide some or all of the requirements specified below. A public body may need the entire spectrum of corporate procurement planning services from data extraction to assistance with the initial implementation of the plan. Alternatively you may just need to pick and choose a smaller selection of services such as presentations to senior management or help in drafting the plan.

Public bodies should take account of the cost of acquiring such services. The cost will vary depending on the scope and complexity of the requirements and the number of consultancy staff required to complete the task. The daily rates to be charged cannot exceed the maximum rates quoted in their replies to the request for expressions of interest and are available from the contacts listed above. These are valid for a two year period from October, 2006 until October 2008.

What can you not buy through the Framework?

This framework has been established to provide consultancy services to assist non-commercial public sector bodies in their requirement to complete individual Corporate Procurement Plans. It should not be used by public sector bodies to acquire consultancy services other than for the planning, development, completion and implementation of Corporate Procurement Plans. The acquisition of any other consultancy services by public bodies should be subject to the normal EU and national tendering and procurement rules.

Rules of the Framework

The first thing to note is that you are free to use the framework or not at your discretion, though if you want to engage the services of consultants or advisors outside the framework you are subject to the usual national and EU procurement rules and guidelines. By using this framework as outlined (including mini competitions) you are fully compliant with all the tendering requirements under EU and national legislation. If you do choose to use the framework then the following rules apply:

1. You must treat all of the providers fairly and equally.

This means that when you want to acquire services through the framework you must specify your requirements in a non-discriminatory way and solicit a quote from all 8 providers.

2. You must allow the providers sufficient time to respond to your request for quote.

These can vary significantly in complexity, and you must allow the providers a reasonable amount of time to submit a response. While the provisions on frameworks do not prescribe a minimum time limit for mini-competitions, the complexity, scope and urgency of the particular assignment should be borne in mind when setting the closing date for quotes.

3. You must be open and transparent with regard to how you will select the winning quote.

When requesting quotes from providers you should state the criteria you will apply to select the winner. Providers will normally be judged on cost and 'fit' with your needs. The framework allows you to apply any or all of the following criteria:

- a. Suitability of proposal
- b. Expertise and skills particularly relevant to the requirement specified by the public body
- c. Cost
- d. Special requirements

Acquiring services from the Framework

To do this you must seek a quote from each of the 8 providers – this process is called a mini-competition.

Public bodies will need to carefully assess their own needs and set out their requirement in the mini-competition to select a suitable provider.

The attached template sets out each of the main headings of the services available under which you should specify your particular requirements. It will be important to provide sufficient information for the providers to come back with meaningful quotes that will allow you to evaluate them accordingly to the nature and scope of services you require.

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SUPREM

The Department of Finance approach to Corporate Procurement Planning is supported by a supply positioning tool called SUPREM which has been licensed from Queensland Purchasing, Australia. It is based on the principle that organisations need to pursue different purchasing approaches or strategies for different goods and services depending on their relative expenditure and risk (difficulty of securing supply).

Under the terms of the licensing arrangement, this software tool is available free of charge for use by public sector organisations **only** in order to help in the analysis of procurement expenditure. The role of the Consultants is to support the use of SUPREM by assisting in the preparation of data, advise on categorisation and/or risk and assist public bodies in the interpretation of the SUPREM (outputs) reports.

Public sector organisations need to register with the Department of Finance in order to gain access to SUPREM. This is a simple process. Please contact suprem@finance.gov.ie for further details.

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**Draft template for individual public service bodies to seek services from consultants on the
framework.**

Request For Quote

Under the

Corporate Procurement Planning Consultancy Services Framework

(Vendor Name)

Contact Name:

Telephone:

e-mail:

Vendor's RFQ Reference:

Please quote for the consultancy services detailed below under the terms and conditions of the Corporate Procurement Planning Consultancy Services Framework.

1. Customer Organisation

Insert name of public body

2. Contact Name:

Contact e-mail:

Contact Phone:

*Insert name and details of contact point in
the public body*

3. Closing Date/Time for responses:

*While the provisions on frameworks do not
prescribe a minimum time limit for mini-
competitions, the complexity, scope and
urgency of the particular assignment
should be borne in mind when setting the
closing date for quotes.*

4. Address(es) where services required:

*Location of office(s) of public body where
services are likely to be required to be
delivered.*

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5. Description of Requirements

The corporate procurement plan is an important way of helping to manage the development of the procurement function in public bodies. Time and attention should be given to setting out the requirements in order to better inform the consultants of the individual planning needs of the public body and to ensure an effective competitive process when mini-competitions are being organised.

It is therefore in the interest of public sector bodies that they include as much relevant information in all parts of the request for quotes so that consultants will come back with meaningful responses to individual requests that will allow public sector bodies to evaluate them and acquire the services they require at the costs quoted.

Scoping out the requirements at this stage should prevent adding on additional work when the consultant has been chosen for a particular set of work arising from a mini-competition. There is a risk that the costs will escalate if this scoping exercise is not effective and this can reduce the value for money outcomes of developing and implementing a Corporate Procurement Plan.

It is important that the appropriate structures are in place to facilitate and develop a Corporate Procurement Plan. Public bodies should form an appropriate internal group to agree specifications when they are seeking external assistance from consultants. This group should include all the relevant expenditure areas (such as finance, personnel, and relevant business units). It should also be involved in scoping out the requirements, organising the mini competitions and ensuring that the work is effectively completed by the consultants and in good time.

Background

Give a brief description of nature, size and function of the public sector profile by way of background that may help providers.

Estimated Value of annual Procurement Spend for [PUBLIC BODY NAME]:
<i>This generally excludes all pay, pensions, and grants to other public or private bodies and applies to expenditure incurred by the individual body. This information can help to indicate scope of assignment to the successful providers</i>
Details of Financial Management system used in [PUBLIC BODY NAME]:
<i>Details of the type of system and nature of reports on procurement expenditure it can produce. This may give an indication of the type of reports available and/or complexity of relevant data</i>
Estimated date services will be required to commence on:
<i>Will allow the provider to allocate his resources accordingly</i>
Expenditure analysis (including supplier and transaction analysis):
<i>Give details of exactly what is required. You can specify this either in terms of what work you may have completed (include details such as no. categories identified, total spend, no. of invoices, no. of suppliers etc. that should all help the providers to anticipate the scope of the assignment) or the specific tasks that you will require the provider to undertake.</i>
<i>You may need to think about the following expenditure analysis tasks in framing your requirement:</i>

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- *cleaning and classifying information obtained from the public body's financial system;*
- *defining and quantifying spend categories for supply positioning;*
- *advice on estimating the risk involved for each category;*
- *assistance with interpretation of the supply positioning chart (SUPREM) ;*
- *identifying the number of suppliers, the value of business with each supplier and the range of goods or services supplied;*
- *identifying the number, range and value of transactions (invoices, payments etc);*
- *identifying the number of transactions per expenditure item or category; and*
- *determining the number, type and value of the contracts between each supplier and the public body.*

Note: The particular requirements are likely to differ for each organisation – this list is indicative and it is a matter for the individual public body to agree and specify these requirements in detail. If a public body does not require services under any of the headings in this template then the relevant section should simply be left blank.

Estimated time required (hours/days as appropriate): *The shaded sections are for*

Cost (excl VAT) for this portion of consultancy services: *completion by the provider*

Additional travel and other expenses:

Total Cost for this portion of consultancy services:

Analysis of organisational capacity /competence:

Give details of exactly what is required. You can specify this either in terms of what work you may have completed or the specific tasks that you will require the provider to undertake. Give the providers a brief description of the current situation - how procurement is organised (how many staff are involved, is it centralised/decentralised), whether explicit policies and procedures are in place, systems skills etc.

The four areas that should be addressed in capacity/competence assessment are:

1. Procurement planning: the current planning framework if any, that sets the agenda for procurement;

Consider:

- *Who in the organisation is responsible for planning and co-ordinating the procurement function e.g. Procurement Officer, individual business units etc.*
- *How they carry this planning process out. In other words, what steps does it involve? For example, does it involve demand/spend analysis and the development of buying strategies for each category of goods or services and, in particular, for what might be considered your organisation's significant purchases? Are these steps carried out at a central level or within each business unit if at all*
- *Are other staff involved in this process, or is there a planning group? If so, how does this operate?*

2. Procurement management and operational structures: existing staff involved in procurement, their role and skills base;

Consider:

- *How procurement is managed and operated in the organisation. The degree to which expenditure is devolved to individual business units or otherwise.*
- *Who is involved in procurement planning (strategic), who is involved in determining what is bought and in what volume (tactical), who is involved in establishing RFTs and, where relevant, purchasing off established contracts (operational).*
- *The roles and responsibilities at the three levels – strategic, tactical,*

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<p style="text-align: center;"><i>operational – and the level of interaction (if any) between officers at these three levels.</i></p> <ul style="list-style-type: none"> ○ <i>The type and level of reporting on outcomes, if it happens.</i> ○ <i>The skills levels and experience of those involved at each level. This may require a brief survey of those involved in purchasing</i>
<p>3. <u><i>Procurement procedures and practices:</i></u> <i>how goods and services are currently bought and how arrangements are managed;</i></p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> ○ <i>What constitutes procurement procedures in your organisation? Is procedure understood solely as compliance with the EU Directives and Guidance issued by Department of Finance or is there a formal procedural framework setting out requirements for planning, information management, contract monitoring, performance review etc?</i> ○ <i>How practice compares to the procedures in place.</i>
<p>4. <u><i>Systems:</i></u> <i>how well (or not) technology such as the reports form the financial management system (FMS) and e-procurement solutions help (or hinder)and/or streamline procurement related activity</i></p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> ○ <i>The degree to which the existing and/or planned ICT systems in your organisation effectively support the procurement function</i> ○ <i>The type of information available from the management information system on procurement activity.</i> ○ <i>Issues regarding coding and whether, for example, in bodies with a number of different agencies there is a common coding system to support a whole-of-organisation analysis of expenditure</i> ○ <i>The use of electronic fund transfers and potential to use online catalogues and purchasing cards to procure goods and services</i> <p><i>Note: the focus should be on the relationship between ICT systems and procurement. Avoid general analysis or description of the MIF project or other such projects. Rather, ask yourself do these properly support efficient procurement or what impact do they have on procurement. The extent to which procurement data can easily be extracted should also be a considered.</i></p>
<i>Estimated time required (hours/days as appropriate):</i>
<i>Cost (excl VAT) for this portion of consultancy services:</i>
<i>Additional travel and other expenses:</i>
<i>Total Cost for this portion of consultancy services:</i>
<i>Development and introduction of Corporate Procurement Plan:</i>
<i>Give details of exactly what is required. You can specify this either in terms of what work you may have completed or the specific tasks that you will require the provider to undertake (drafting, assembling and summarising information; amending / finalising plans) E.g you may have completed the expenditure and organisational capacity/competence analysis and have drafted a plan</i>
<i>but would like that work reviewed. You may need assistance presenting your findings to management in order to get the required ‘buy-in’ and acceptance of the plan across the Organisation. You may need help with the drafting of the plan itself following on from the analysis completed by either yourself or the provider You should have familiarised yourselves with the structure and detail of the Corporate Procurement Plan template supplied by the NPPPU to assist you with this task. As with previous sections it’s important to give</i>
<i>the providers adequate information to ensure they can estimate the amount of work involved.</i>

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<p><i>Note: It is not possible to devise and develop a corporate procurement plan without the underlying analysis. If you want to have a plan developed or assistance in developing a plan, it is necessary that your organisation has carried</i></p> <p style="margin-left: 20px;"><i>(1) Expenditure Analysis</i></p> <p style="margin-left: 20px;"><i>(2) Organisational Analysis</i></p> <p><i>If not then, it will be impossible for any provider to develop a plan. If you cannot carry out an appropriate procurement analysis, you should require that one is carried out on your behalf. Public bodies should be aware that the quality of the underlying analysis impacts on the plan – <u>The better the analysis, the better the plan.</u></i></p>
Estimated time required (hours/days as appropriate):
Cost (excl VAT) for this portion of consultancy services:
Additional travel and other expenses:
Total Cost for this portion of consultancy services:
Initial support in implementing the Corporate Procurement Plan in the public body:
<i>Give details of exactly what is required. Headings you may wish to consider your requirements under include:</i>
<ul style="list-style-type: none"> • <i>Developing approaches for communicating the Corporate Procurement Plan to appropriate individuals and units in the body;</i> • <i>Developing approaches to participation and ownership of the Corporate Procurement Plan within the particular public service body;</i> • <i>Ensuring acceptance of the Corporate Procurement Plan at management level;</i> • <i>Advising on appropriate implementation mechanisms; and</i> • <i>Advising on appropriate mechanisms for monitoring, review and reporting of outcomes.</i>
Estimated time required (hours/days as appropriate):
Cost (excl VAT) for this portion of consultancy services:
Additional travel and other expenses:
Total Cost for this portion of consultancy services:
Other Specific requirements:
<i>This section allows you to identify/describe requirements or issues that may be particular to your organisation that you wish the provider to focus on or address.</i>
<i>Examples of such requirements might be the review of a particular contract/category/practice; advice on contract management; explanation of relevant concepts to key individuals etc</i>
Estimated time required (hours/days as appropriate):
Cost (excl VAT) for this portion of consultancy services:
Additional travel and other expenses:
Total Cost for this portion of consultancy services:
Estimated Total Time required (hours/days as appropriate):
Total Cost (excl VAT) for all services specified:
Total travel and other expenses:
Total Overall Cost:

6. Evaluation Criteria

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Public Bodies must use the following Evaluation criteria as these were set out in the specifications for the framework agreement in accordance with Article 32(4)(d) of Directive 2004/18/EC. However the weightings of these criteria and any particular requirements sought/specified are a matter for the individual public body.

Criterion	Marks
Suitability of Proposal	
Expertise and Skills particularly relevant to the requirements specified by the public sector organisation	
Cost	
Special Requirements	

Customer Notes

1. No obligation exists on the customer to avail of the services on foot of this competition.
2. *Please add any further notes if required*

Vendor Response Notes

The vendor must note any issues relating to their response here

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Specification of Requirements as set out in original Request for Expressions of Interest

A.1 **SPECIFICATION OF REQUIREMENTS**

The type of services which are likely to be required by public bodies in the development and implementation of Corporate Procurement Plans are broadly outlined in this section. Public bodies may require assistance in some or all of these areas:

A.1(1) Expenditure analysis to include:

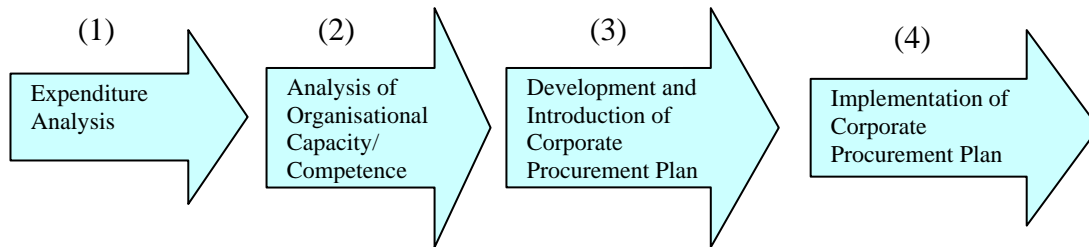
- categorisation of procurement spend and supply positioning
- supplier analysis
- transaction/invoice analysis

A.1(2) Analysis of organisational capacity and competence

A.1(3) Development and introduction of corporate procurement plans

A.1(4) Initial support in implementing the corporate procurement plan in the public body.

Steps in Corporate Planning Process:



The following provides a more detailed overview of these requirements.

A.1(1) *Expenditure analysis*

Interested providers should be prepared to advise public bodies or undertake some or all of the following tasks:

- cleaning and classifying information obtained from the public body's financial system;
- defining and quantifying spend categories for supply positioning;
- advising individual bodies in estimating the risk involved for each category;
- assisting individual bodies in interpreting the supply positioning chart;
- identifying the number of suppliers, the value of business with each supplier and the range of goods or services supplied;
- identifying the number, range and value of transactions (invoices, payments etc);
- identifying the number of transactions per expenditure item or category; and
- determining the number, type and value of the contracts between each supplier and the public body.

Analysis Tool

The Department of Finance approach to Corporate Procurement Planning is supported by a supply positioning tool called SUPREM. The use of SUPREM is governed by a legal agreement between the Department of Finance and Queensland Purchasing and the use of this system by any public body is subject to that agreement. Access to the programme is controlled by the Department of Finance and it is available free of charge to public sector bodies only. It is available to help in the analysis of their procurement expenditure. Expenditure analysis should, in all cases, be based on the SUPREM tool. Public bodies may be at various stages in the expenditure analysis process viz.

- In some cases public bodies will already have completed their supply positioning chart using SUPREM;
- Others will need assistance in preparing the data and interpreting the results but will be familiar with SUPREM and can input the relevant data; and

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- Others will not be familiar with SUPREM and may or may not have any analysis done.

Relevant material will be provided to successful providers on the use of SUPREM by the Department of Finance.

Required output from expenditure analysis

The expenditure analysis is a key part of the Corporate Procurement Planning process and must at a minimum result in:

- An understanding of what goods and services are bought, who purchases them in the public body and from whom they are bought;
- The identification of expenditure that is critical to the delivery of the organisation's goals and/or services;
- The identification of the volume and value of transactions (invoices, payments etc) processed by the public body;
- Determination of the number of suppliers from whom the organisation purchases and how the organisation interacts with individual suppliers in terms of total spend and/or frequency and value of individual transactions; and
- Initial conclusions which may suggest potential opportunities and strategies for improved outcomes. For example, categories appropriate for aggregation of demand, potential for the use of purchase cards, supply base rationalisation, modifications to existing product coding or other data management strategies.

A.1(2) *Analysis of organisational capacity and competence*

Successful providers will be expected to assist public bodies in assessing their existing procurement organisational capacity/competence by means of gap analysis along the following lines:

Assessment of current situation

- Procurement planning: the current planning framework if any, that sets the agenda for procurement;
- Procurement management and operational structures: existing staff involved in procurement, their role and skills base;
- Procurement procedures and practices: how goods and services are currently bought and how arrangements are managed;
- Procurement ICT systems: how well the financial management systems supports the procurement function (including purchase-to-pay cycle and coding protocol) and the use of e-procurement solutions in the organisation (online ordering, electronic invoicing, purchase cards integrated with the financial management system (FMS) etc).

Outcome of gap analysis

It is envisaged that this analysis should result in:

- An understanding of how procurement is currently structured and how it functions in the organisation;
- Identification of the match and mismatch between current arrangements and best procurement practice; and
- Providing recommendations to bridge any identified gaps.

A.1(3) *Development and introduction of corporate procurement plans*

Successful providers will be expected to assist public bodies in the various aspects of developing a Corporate Procurement Plan. The Department of Finance has developed a template Corporate Procurement Plan to assist in this process. An electronic copy of the template is included with this document. The template plan is structured as follows:

- Section 1: Procurement Analysis A summary of the key findings from the expenditure and gap analyses.
- Section 2: Procurement Principles and High Level Goals
Based on the findings presented in Section 1
 - A series of high level procurement goals are set for public body;

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- A detailed breakdown of implementation (for each goal) including setting targets and objectives, where appropriate.

Note: Some public bodies will have already completed some of the analysis required and in some cases will be drafting their Corporate Procurement Plan. In such cases, an assignment may involve reviewing the work completed in preparation for the implementation phase.

A.1(4) *Implementation of Corporate Procurement Plan*

Successful providers may also be expected to assist public bodies in implementing their Corporate Procurement Plans process by advising and assisting them in some or all of the following:

- Developing approaches for communicating the Corporate Procurement Plan to appropriate individuals and units in the organisation;
- Developing approaches to participation and ownership of the Corporate Procurement Plan within the particular public service organisation;
- Ensuring acceptance of the Corporate Procurement Plan at management level;
- Advising on appropriate implementation mechanisms; and
- Advising on appropriate mechanisms for monitoring, review and reporting of outcomes.