

Procurement Journey

Management Information

Management Information

(Example for a collaborative arrangement which can be modified as required)

Although Management Information (MI) should only be requested on in-scope products/services, where requested by the buying organisation, the supplier should provide the organisation with their complete spend profile.

Where MI is in-scope, the supplier will be required to make available quarterly online reports and information, including:

1. **Executive Summary** – High level summary information overview overall/sector/org
2. **Participation Agreements** – Details of organisations utilising contract, including (anticipated) start date (grouped by sector)
3. **Monthly spend by lines, cost centre/organisation** – incorporating MI template, and including further information including UNSPSC (or some form of product group distinguisher), environmental indicator, order reference.
4. **Number of orders placed** – information should be available down to delivery point level and indicate frequency of ordering.
5. **Number of orders placed by value** – grouped by order value
6. **Average order value** – available down to delivery point level
7. **Number and value of back orders** – including resolution time period
8. **Number and value of returns/credits** – including reasons for returns
9. **Expenditure by product group and sub-product group** – Link into UNSPSC or form of product grouping
10. **Expenditure core versus non-core**
11. **Overall expenditure by current quarter versus last quarter** – this should build up over duration of contract to allow analysis of on going spend.
12. **Overall expenditure by product split by building** – to include no. of delivery points per organisation and per site, frequency of deliveries made to these delivery points and order values.
13. **% of products ordered with a recycled content plus no. of items sent back/collected for recycling** - clarify definition of environmental products.
14. **Product/service availability** – identify those items which were out of stock or services which could not be fulfilled, and where substitution occurs, detail the substitution and the number of days for the requirement to be fulfilled.
15. **Number and Percentage of all order lines/requirements dispatched/serviced on time**
16. **Benchmark Data**
17. **e-Commerce Summary** – identify spend going through e-procurement systems
18. **Invoice queries** – including number of and the resolution time [reasons should be available if asked for].
19. **Sundries** – provide breakdown of non-cost elements e.g. catalogues/recycling boxes requested, including the number issued and the delivery point they are sent to.

Where appropriate, all reports will be available against individual organisations and sectors.

On a quarterly basis, the supplier will provide benchmark data against the market place. .

2.5.3 Management Information (Mandatory Statement of Requirement 1.6)

The supplier will prepare and submit management and performance information reports in an electronic format within 10 working days from the end of the relevant quarter:

Reports to be collated by pick up point, by customer cost centre, by sector and at a national level unless otherwise stated.

- **Expenditure by service**
- **Number of consignments by service**
- **Number of parcels within a consignment**
- **Total weight of parcel**
- **Average order value of consignment**
- **Average distance for same day delivery**
- **Payment terms from customer by cost centre**
- **Payment terms to supplier**
- **Cost savings**
- **Sustainability, including social, economic and environmental considerations**
- **% Order fulfilment for time specified service**
- **No of failed jobs, reasons for failure.**
- **Customer complaints, detailing resolution and time of resolution**
- **Health & Safety – Reportable incidents, near misses and other H&S issues**
- **KPI's & Continuous Improvements - (Report to be developed and agreed with supplier and Lead Contracting Authority)**

Confirm your ability to meet the requirement: Yes No (If you choose "No", you should qualify that answer and note that your tender may be rejected as a non-compliant bid.)

➤ Please attach proposed Template and format

Over-all Weighting: 1%

2.5.4 Performance Management and Development

The supplier will be responsible for managing the level of service associated with the provision of this framework. In doing so, they shall be able to demonstrate customer satisfaction and they shall provide a mechanism for dealing with customer complaints within 24 hours of receipt and follow this up in writing within 5 working days.

The supplier will be expected to propose and work actively on continuous improvement initiatives throughout the term of the Framework Agreement.

Confirm your ability to meet this requirement: Yes No

Please provide details of:

- The structure of your proposed customer satisfaction survey.
- Your customer complaint process specifying how this would operate in practice for the proposed framework?
- Your process for capturing, proposing and delivering continuous improvements? You may wish to include reference to additional management information reports or key performance indicators which you believe would be beneficial to track and report under this framework agreement to monitor or improve performance. (Please refer to required MI reports and indicative KPI's outlined in 2.5.3 and 2.6 respectively)

Please outline an improvement initiative or innovation opportunity which you would intend to lead or propose in respect of this Contract / Framework Agreement.

Over-all Weighting: 4%

2.5.5 Mobilisation

An initial implementation plan will be established jointly with the successful suppliers, Centre of Expertise (CoE's) and the proposed customers. Thereafter, suppliers will be required to develop and maintain a rolling deployment programme which will be regularly reviewed.

Confirm your ability to meet this requirement: Yes No

Provide your proposed mobilisation plan, including allocation of resources to meet the plan.
Detail the duration you will require from award of Framework Agreement to being able to receive service orders.
Detail any assumptions, expected risks and issues associated with the migration phase and how you will mitigate them. Please include details of any assistance you will require from the lead organisation and individual customers to ensure successful mobilisation of this contract.

Over-all Weighting: 6%.

2.5.8 Disaster Recovery, Business Continuity & Risk Management

Provide details of your Disaster Recovery, Business Continuity and Risk Management Plans and detail how they will be implemented and work in practice in relation to this Contract / Framework Agreement to ensure continuity of service.

Over-all Weighting: 1%

2.6 Performance Management & Development

Please Note: Section 2.6 Performance Management & Development is for information purposes only.

Quarterly meetings will be held between Procurement and the supplier's representative to review and improve the performance of the Agreement against the agreed service levels as measured through Key Performance Indicators. Quarterly reports detailed in 2.5.3 will be provided by the supplier.

This section indicates our proposed Key Performance Indicators (KPI's) and expected performance targets.

Indicative Performance Indicators

Service Function	Key Performance Indicator	Target Level
Management Information	Contractor to make available quarterly online reports and information.	a) Data provided by the 10th day of the appropriate month
		b) In the format required by Authority
Order Fulfilment	A minimum order fulfilment service level of 98% will be required for all orders.	98% of orders
Complaints	Complaints to be escalated and resolved as per agreed procedure	98% of collection & Deliveries to have no complaint left unresolved over 5 days from date of complaint recorded.
Payment	Prompt payment of sub-contractors and/or consortia members (if applicable). Maximum of 30 days from receipt of payment from client, 10 days target	100% within 30 days.
Customer Satisfaction	Customer Satisfaction Survey	Customer Satisfaction Index, to be agreed between and Supplier.
Continuous Improvement & Innovation	Contractor will work with the Authority/Clients to map full end to end supply chain and identify and prioritise supply chain initiatives throughout the life of the Framework Agreement.	To be identified and agreed in partnership

In partnership we will drive down cost, improve the quality, efficiency, and/or contribute to the sustainability of that supply chain, including associated services under the terms of this framework.

This is intended to include, but will not be restricted to:

- Cost reduction initiatives
- Supply chain efficiency initiatives
- Demand management initiatives
- Sustainable procurement initiatives
- Technology or innovation related initiatives
- Quality improvement initiatives.
- Management Information quality and efficiency initiatives

2.7.10 Marketing including Buyers Guide

The supplier will be required to support Lead organisation in promoting the Framework Agreement across the Scottish public sector. The supplier will be required to actively sell the benefits of the Framework Agreement including cost, environmental, resource and operational efficiencies. This will include, but will not be limited to, the supplier assisting in the production of a Collaborative Buyer's Guide (electronic and paper format) within 1 month from the Framework Agreement award. The buyers guide will as a minimum include:

- How to order/request services
- All services available from the Framework Agreement
- Charges for all services and call tariffs
- Framework Management structure and contact details (including Account, Service and Contract Management, Access requests, Orders and Faults)
- Escalation processes

This will be managed by the supplier in conjunction with lead buying organisation..

Confirm your ability to meet this requirement: Yes No

Provide details of how you would propose to assist in the marketing of the Framework Agreement. Your proposals should include sample marketing material to be used and communication plans.

Provide details of what you would additionally propose to include in the buyers guide and provide an example of a buyer's guide you currently produce or a template you would propose for this Framework Agreement.

Over-all Weighting: 1%