## Small and Medium Enterprises Engagement Plan

| Recommendation | Action | Responsible Officer | Others | Start Date | Due By | Date Completed |
| --- | --- | --- | --- | --- | --- | --- |
| Strategy & Policy |
| Local authorities to ensure that their procurement strategies explicitly recognise the significant benefits of procuring from local small businesses when tendering for goods and services without compromising their legal stipulations. | To incorporate recognition of the benefitsof procuring from local small businesses within the Procurement Strategy  | Strategic Procurement Leads | Senior Leadership Team | January 2014 | May 2014 | June 2014 |
| Local authority economic development strategies to take account of the needs of the existing local economy and inform procurement strategy based on a comprehensive analysis of spend. | To incorporate spend analysis within the Service Area Sourcing Plans in order to inform strategic spend decisions | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | January 2015 | Completion of Sourcing Plans started Jan 2015 |
| To incorporate meeting the needs of the local economy as a key area for consideration under the delivering policy through procurement section of the Service Area Sourcing Plans | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | January 2015 | Jan 2015 |
| To address meeting the needs of the local economy within the development stage of the procurement process and include as an activity within the Procurement Plan template | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | January 2015 |  |
| Local authorities to consider actively how much of each procurement decision should be assigned to social value considerations. | To incorporate social value requirements as a key area for consideration under the delivering policy through procurement section of the Service Area Sourcing Plans | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | January 2015 |  |
| To address social value considerations within the development stage of the procurement process and include as an activity within the Procurement Plan template | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | January 2015 |  |
| Local authority procurement strategies to set out how they will ensure best practice is followed and how they will monitor that progress. | There is a governance structure for monitoring and compliance of Strategy delivery in place | SLT | Strategic Procurement Leads | January 2014 | May 2014 | June 2014 |
| There is a governance structure for monitoring and compliance of Service Area Sourcing Plans in place | Executive Heads | Strategic Procurement Leads | January 2015 | March 2015 | April 2015 |
| To set up the following toensure best practice is followed and progress is monitored* SME Engagement Plan as an Appendix to the Procurement Strategy
* SME Engagement Plan as an Appendix to the Service Area Plans as a point of reference
* Procurement Strategy Implementation Plan
* Specific Action on the Strategy Implementation Plan for Developing Mechanisms for sharing best practice
* Addressing People and Capability Development within the Service Area Sourcing Plan
* Individual Procurement Delivery Plans within the Service Area Sourcing Plan
 | Strategic Procurement Leads | Executive Heads and Service Managers | January2015 | July 2016 | Started Jan 2015 |
| Local authorities to break down contracts into smaller lots wherever practical. | Incorporate the need to consider breaking down contracts into smaller lots into Contract Standing Orders | Strategic Procurement Leads | SLT and Full Council | January 2014 | April2015 | Feb 2015 |
| To incorporate considering the need of Lots as a key area for consideration under the delivering policy through procurement and the supporting the local economy sections of the Service Area Sourcing Plans | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | March 2015 |  |
| To address considering the need of Lots within the development stage of the procurement process and include as an activity within the Procurement Plan template | Strategic Procurement Leads | Executive Heads & Service Managers | January 2015 | March 2015 | Feb 2015 |
| Spend Analysis |
| All authorities to have mechanisms in place to record and analyse where and with which businesses their money is spent. This should include measuring the size of enterprise – medium, small or micro. | Torbay Council has adopted the Atamis spend analysis system which is a South West wide collaborative contract, to encourage a consistent approach to spend analysis. The system has functionality to analyse spend by size, sector and location, including VCSE and micro businesses. | Strategic Procurement Leads |  |  |  | April 2014 |
| Local authorities to make information on spending publicly available and easily accessible in a useable format, at least annually. | We will publish spend data by size, sector and location, including VCSE and micro businesses on the Council’s Website | Strategic Procurement Leads |  | February 2015 | April 2015 | July 2015 |
| We will be working with the FSB to develop and update the procurement pages of the Council Website, in order to make them more accessible and informative. This will include:* Procurement forward plan
* How to do business with the Council guide
* Advertising supplier events and training opportunities
* SME Engagement Plan
* Link to the Electronic Tendering Portal
* Contracts Register

Link to Contracts Finder | Strategic Procurement Leads | FSB | April 2015 | March 2016 |  |
| Local authorities to monitor and take account of the local economic impact of their key spending decisions. | Use the Atamis spend analysis system to monitor trends year on year and building the key findings into the Service Area Sourcing Plans and Procurement Strategy.  | Strategic Procurement Leads |  | April 2015 | Ongoing Annually |  |
| Process Simplification |
| Local authorities to adopt appropriate best practice with regard to their use of pre-qualification questionnaires (PQQs), which may include the adoption of existing, standardised PQQs; simplified pre-qualification processes for smaller procurements below EU thresholds; online pre-qualification; and discontinuation of PQQs and other requirements where they are unnecessary. | We have adopted the national government standard PQQ. This is on our tendering system so can be completed electronically. This system retains the supplier’s response so it can be reused for subsequent tenders.  | Strategic Procurement Leads |  |  |  | April 2012 |
| We will be providing training to suppliers on how to complete the PQQ, why they are necessary and explaining the compliance requirements within them. | Strategic Procurement Leads | FSB | Feb 2015 | Ongoing |  |
| We will be reviewing all of our procurement processes to take into account revised procurement legislation and Small Business, Enterprise and Employment Bill. | Strategic Procurement Leads |  | Feb 2015 | Ongoing |  |
| Local authorities in the UK to consider using the relevant national, regional and sub-regional portals to advertise their procurement opportunities wherever appropriate to do so.  | We use the Supplying the South West regional e-tendering portal. This is undergoing development to become a national e-tendering portal, which will link directly into Contracts Finder. | Strategic Procurement Leads |  | June 2014 | Dec 2015 | 2009 |
| We are in the process of redrafting the Council’s Contract Standing Orders which includes a recommendation to Council to mandate the use of Supplying the South West for all spend over £10K. | Strategic Procurement Leads | SLT and Full Council | January 2014 | June 2015 | Completed redraft – In approval stage |
| We will be rolling out the use of the Quick Quote facility within the system for all spend within the Request for Quote limit.  | Strategic Procurement Leads | Executive Heads and Service Managers | June 2015 | In line with Service Area Sourcing Plan implementation |  |
| Local authorities to ensure their use of selection requirements is proportionate and based purely on the needs of the contract and ensure that e-tendering systems, where practical, reduce consistent repetition of requirements for supplier information. | We will be working with the FSB to simplify our processes and documentation and ensure they are proportionate and consistent. | Strategic Procurement Leads | FSB | Once the new Public Contracts Regulations are in place | Ongoing |  |
| SME Engagement |
| Local authorities to ensure they have initiatives to support local SMEs with the tender process and to develop the potential of their local small business supplier base. | We will be working with the FSB on a number of initiatives to support local SMEs, including:* Meet the Buyer – general and procurement specific events
* Training on understanding requirements, completion of documents and undertaking a procurement process
* Development of simplified documentation
* Development of a How to Do Business with the Council Guide
* Redesign of the Procurement pages on the Council website
* Encourage registration by SMEs onto Supplying the South West and use this as a registry of local businesses
 | Strategic Procurement Leads | FSB | Once the new Public Contracts Regulations are in place | Ongoing |  |
| Local authorities to provide detailed, specific and timely feedback to all businesses that request it under the provisions of the Remedies Directive 2009 in order to improve their bidding capabilities. | We provide tender specific feedback to suppliers in accordance with the provisions of the Remedies Directive 2009. | Strategic Procurement Leads |  |  |  | December 2009 |
| We will be replicating this with below threshold tenders. | Strategic Procurement Leads |  | April 2015 | In line with Service Area Sourcing Plan implementation |  |
| We will include general feedback and guidance to suppliers via Meet the Buyer and training events. | Strategic Procurement Leads |  | Once the new Public Contracts Regulations are in place | Ongoing |  |
| Local authorities to ensure that regular training opportunities and supplier pre-engagement activities are available for small businesses in their area, to ensure that capacity is built ahead of opportunities becoming available and support market shaping.  | We are building pre market engagement and market development activities into individual Service Area Sourcing Plans. | Strategic Procurement Leads | Executive Heads and Service Managers | January 2015 | In line with Service Area Sourcing Plan implementation |  |
| We will be undertaking general and contract specific Meet the Buyer events. | Strategic Procurement Leads | Executive Heads and Service Managers | January 2015 | In line with Service Area Sourcing Plan implementation |  |
| We will be carrying out a range of training activities designed to build capacity in the local SME market. | Strategic Procurement Leads | FSB | Feb 2015 | Ongoing |  |
| We will work in partnership with the FSB and the Council’s Economic Development Team to support supplier events. | Strategic Procurement Leads | TDA and FSB | February 2015 | Ongoing |  |
| Payment Practices |
| Councils to put in place and monitor specific payment policies for small business suppliers, ideally following the lead of national government pledges to pay within ten days of receipt. | We are working with the payments team to monitor and review payment processes and policies. | Strategic Procurement Leads | Payments Manager | January 2015 | Ongoing |  |
| Councils to consider the use of contract clauses to ensure that prime contractors pass on the council’s payment terms to their subcontracted suppliers, and that the subcontracted suppliers likewise pass on terms throughout the supply chain. | We are in the process of redrafting our contract Terms and Conditions and the revised terms will include clauses relating to the passing on of payment terms to sub-contractors. This will also take into account the requirements set out in the revised Public Procurement Regulations and the Small Business, Enterprise and Employment Bill. | Contracts Solicitor and Strategic Procurement Leads |  | September 2014 | July 2015 |  |