

Good, Better, Best

Are you the sort of person who starts by reading a manual from front to back or do you get stuck in first and only resort to the manual when things go wrong? Do you even know if there is a manual? Whatever your personal approach, there is certainly little doubt that there is a significant amount of guidance covering most, if not all, of the commercial roles in government and that you should read it before embarking on a new project. It is also constantly being refined and improved, as our stories on the changes to the Gateway guidance and the Successful Delivery Toolkit show. But as our lead news item, *'Making Best Practice Better'*, makes clear, there are a number of reasons why the implementation of the guidance is not always as successful as it could be. Jonathan Tamblyn, in his review, is seeking to identify why that is so and to make recommendations to improve the success rate.

Working together is another important topic in this edition. The establishment and work of the Collaborative Opportunities Advisory Group has given a big boost to cross-government co-operative working and our report *'Collaborative Working Gets Serious'* sets out the key principles of making it happen. *'Achieving Excellence Through Integration'* takes these principles through to demonstrating the value of integrated teams. We also pick up on the growing importance of cross-European standards – firstly in highlighting the review being undertaken by Alan Wood and secondly in reporting the successful hosting, by OGC, of the European Public Procurement Network Conference.

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Making Best Practice Better

The OGC's Successful Delivery Toolkit and other Best Practice initiatives are widely recognised for their high quality. At the same time, the standards they set out are not always met in practice, with the result that there is scope for improving the success rate of programmes and the achievement of value for money. There may be a number of reasons for this, from (possibly) deficiencies in the guidance itself or its usability, the communication of guidance to departments, or the skills and experience in departments to apply the guidance to full effect.

A small team is therefore currently reviewing the Embedding of OGC's Best Practice across central civil government, with the aim of making recommendations for the way forward. The team is led by Jonathan Tamblyn, who has a background in both the public and private sectors. Jonathan is Chair of the Intellect e-Government Group and the British Computer Society's Government Relations Group, he sits on the Senior IT Forum, has contributed to a number of OGC best practice initiatives in the past, and during 2003 led the development of the new Code of Best Practice for IT Suppliers.



Other members of the team will be well known to many in OGC: Kelvin Medley-Jones and Pippa Bass, who are both SACS consultants, and Neil Glover, John Ioannou and Marilyn Robertson who work in the Successful Delivery Directorate.

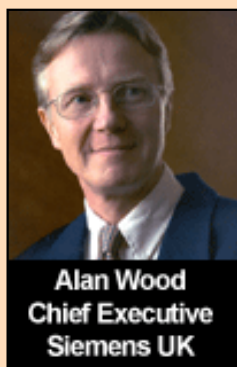
The review started in January and is due to report at the end of March. A number of you will have already been contacted by the review team, and more discussions are planned over the next few weeks.

If you would like more information or have some specific points you would like to make to the review team, contact Marilyn Robertson: <mailto:Marilyn.Robertson@ogc.gsi.gov.uk> [Top](#)

Competing in Europe

Have you ever wondered how public procurement is carried out in other EU countries?

The Chancellor of the Exchequer has asked Alan Wood (Chief Executive, Siemens UK and Chair, EEF Economic Policy Committee) to investigate the experiences of UK businesses in competing for public contracts in other EU countries. OGC is supporting him in this work, reporting to Ministers in the summer.



The Review will look at good and bad experiences, difficulties encountered, including concerns about unfair discrimination, and factors leading to success, as well as how the process compares with tendering for public sector contracts in the UK or for private sector contracts in other EU countries. The final report will recommend areas for raising capabilities, spreading best practice, and tackling non-compliance that the Government can raise at a European level to make procurement markets more effective across the Union. The report will also identify issues that UK firms should be aware of in seeking to improve their ability to compete effectively for public procurement contracts in Europe.

Businesses are invited to give their views on <http://www.woodreview.org/>, where further information is also available. [Top](#)

UKGOV XML Revolution

Following successful assessment trials, a single IT language will revolutionise the way government suppliers conduct business with the public sector. The chosen XML schemas, to be known as UKGOV XML, have been recommended for use by public sector bodies for 'e-Ordering' and 'e-Invoicing' processes. The trials were a joint initiative from OGC, OeE and the Business Applications Software Developers Association (BASDA). This 'common IT language' approach should help eliminate difficulties in exchanging information between suppliers and public sector customers using different IT

systems. Dennis Keeling, CEO of BASDA, said:

“This exercise proves that an industry-wide open-standard can meet the UK Government’s eProcurement requirements. The BASDA eBIS-XML standard, that was adapted for these trials, is currently being used by over 100 organisations across Europe. With minor enhancements these organisations will be able to start exchanging orders and invoices with Government departments.”

For further information go to: http://www.ogc.gov.uk/application.asp?app=press_release.asp&process=full_record&id=1000040 [Top](#)

Gateway Updates

Following stakeholder/customer consultation, the OGC Gateway Process has been updated to provide better support for policy/delivery programmes and to reflect changing policy. The changes incorporate lessons learned and new best practice such as faster procurement, collaboration, the new Achieving Excellence in Construction guidance and support for Centres of Excellence. The key changes are:

- The Project Profile Model (PPM) has been completely revised and renamed as the Risk Potential Assessment (RPA) and, as before, should be completed by the SRO/PM before each review. The new RPA addresses gaps identified in the old PPM particularly the areas of strategic appraisal and business change.
- Projects will no longer be reviewed at OGC Gateway Review 0. See the new OGC Gateway Review 0 workbook for more detail.
- OGC Gateway Review 1 now includes the strategic element previously covered at OGC Gateway Review 0 and will become the first review for procurement projects.

The revised workbooks are published in version 4.5 of the Successful Delivery Toolkit. For further information go to: <http://www.ogc.gov.uk/index.asp?docid=1001448> [Top](#)

Publications

Hot Help for PPM Specialists

Have you received your copy of the first PPM specialism update? It covers the latest and hottest topics associated with the specialism in Government and a copy is available on the PPM specialism website at <http://www.ppm.ogc.gov.uk/>

Following on from the highly successful PPM inaugural conference held on 23 October 2003 at the Inter Continental Hotel in London, a DVD featuring key speeches from the conference is now available. Members who have not received a copy should contact OGC Service Desk on 0845 000 4999 or ServiceDesk@ogc.gsi.gov.uk

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Do You Insist On Design Quality?

“The million-pound mistake is made on day one, in poor briefing and design thinking” *Better Public Buildings*

Good design is about much more than style or appearance – it is about the integration of functionality, whole-life value in relation to maintenance, management and flexibility, sustainability and environmental impact, visual impact including relationship to context, and in particular health and safety. It is about whether a building works well for all users and the community it serves.

Throughout the working life of a public building and beyond, good design will help to make services delivered within and

from it more efficient and effective, and will enhance the experience of all who use and live with it.

OGC has just published *AE 9 Design Quality* - the latest guide in the Achieving Excellence in Construction Procurement Suite. The new guide takes the reader on a clear path through the design process and the role of the client, highlighting critical success factors. It focuses on:



- The characteristics of design quality;
- How good design can be integrated into the procurement process;
- How to ensure that good design is adequately planned for;
- How a facility's value to its users can be maximised;
- How, through good design

- health & safety performance can be improved;
- maintenance requirements can be minimised; and
- environmental friendliness can be optimised.



The guide promotes the use of the Design Quality Indicator (DQI) – an innovation developed to help all built environment stakeholders gain more value from the design of buildings and take the guess work out of the whole design process. DQI focuses on the needs of end users, involves all the stakeholders throughout the process and helps develop a more sustainable building. The overall result is an improved product that allows us to measure and critically learn from the process.

With the OGC Gateway review process providing the framework to give a feel for sequence and timing, and some great exemplar case studies, this guide is a compelling read.

For a free copy of this new guide call the Service Desk on 0845 000 4999 or visit the OGC website: <http://www.ogc.gov.uk/sdtoolkit/reference/achieving/index.html> [Top](#)

In-Depth

Collaborative Working Gets Serious

For some time now collaborative procurement has been recognised as a primary route to maximising government's purchasing muscle and to achieving significant value-for-money savings. Last year, in fact, some £272 million was achieved and a target of £500 million across central government and the wider public sector over the next two years has been set. Mike Burt, Director of Collaboration and Property Co-ordination at OGC, believes that, through the Collaborative Opportunities Advisory Group (COAG), this should well be met. Philip Cunliffe talked to him to find out why. [Page 9 Top](#)

Toolkit Successfully Updated

Version 4.5 of the Successful Delivery Toolkit was released at the end of January with a CD-Rom version following later this month. The Toolkit provides a single point of reference for OGC's policy, best practice and operational guidance for procurement, programmes, projects and risk and service management. This version also includes updated information about Gateways, Market and Supplier Assessments, revision of procurement guidance and Decision Map Operational guidance (an alternative to using PFI for IT procurements). [Page 12 Top](#)





Peter Merrick

Getting It Right From the Start

Would you like to be at the forefront of procurement research? The University of East Anglia is looking for departments with suitable projects to test-run an innovative approach to defining requirements. Peter Merrick, a researcher at UEA, has been working with a number of departments including OGC on an initiative which should bring benefits for both buyers and suppliers. [Page 13 Top](#)

Hope for Local Procurement

The Government's commitment to the *National Strategy for Local Government Procurement*, published at the end of October 2003, has been reinforced by Local Government Minister Phil Hope. Measures to implement the strategy include: the radical policy of allowing councils to borrow as well as freedom to charge and to trade; encouragement to councils to develop effective corporate procurement strategies while absorbing best practice; the establishment of regional centres of excellence in procurement; and a new governance structure, part of which involves communication between the Government and local authorities. [Page 15 Top](#)



Phil Hope, Minister
for Local
Government

People and Events

Colin Lyne Makes the Grade

Colin Lyne has been appointed Commercial Director, Grade 3, for the Department for Constitutional Affairs. His post, as the only Grade 3 directly responsible for commercial affairs in central civil government, is a significant personal achievement and is also a strong statement on the growing importance of professional skills and expertise in delivering government's business needs. Colin's role has been created following a major departmental change programme in which his commercial strategy played an important part. His wide-ranging remit is recognised by DCA management as a key component of their business modernisation programme. [Top](#)



Colin Lyne

New Procurement Team for DTI

Paul Seddon has recently joined Bill Tipping as joint Head of Procurement at the Department of Trade and Industry. Paul moved on promotion from OGC where he had been a Senior Consultant for the past three years and Bill was an internal DTI appointment, previously working as a stream lead in the Business Support Transformation Programme. They said:



Paul Seddon

"Our overall aim is to improve procurement policy and strategy, building on the good work already in place. An early target is to implement our e-Purchasing system with the longer-term aim of becoming the government leader in e-processes by 2005.

"Phase 1 of the system provides an online, self-service capability to select and purchase goods and services in 4 key commodity areas: stationery, mobile phones, training and IT. We intend to expand it across a wide range of

commodities this year.”

For further information contact: Steve Rumbelow on 020 7215 1528 [Top](#)

OGC Talks to Europe

OGC's Procurement Policy Unit hosted the annual European Public Procurement Network (PPN) Conference on 22/23 January 2004 at the Royal Garden Hotel in Kensington, London.

This pan-European event included Slovenes, Finns, Italians and Swiss - fortunately the common language of the PPN is English! 30 European countries were represented in all. The European Commission and European Investment Bank attended as observers. The PPU also managed to attract delegates from the Confederation of British Industry and businesses, whilst the programme itself included a presentation from the Chief Executive of Carillion Plc on suppliers' perspectives in accessing public procurements.



Anne Turner, Director PP, OGC and John McDonough, Chief Executive of Carillion PLC



(l to r) Sally Fryer, Head of Government Marketplace, OGC, Fabien Durand, Administrator, European Commission, Anne Turner

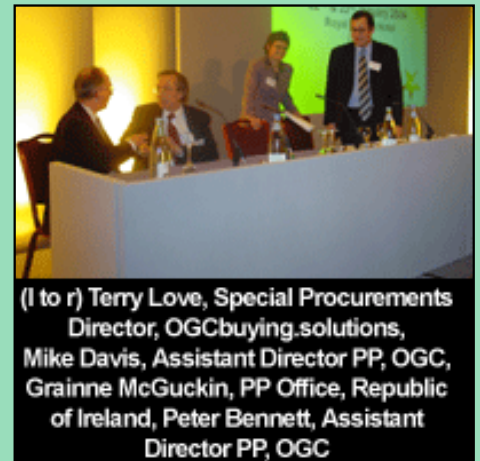
The PPN brings together procurement policy officials from all EU Member States, accession countries of central and eastern Europe, as well as the remaining European countries. It has two main purposes. First, it is an informal network of officials who can work together to resolve complaints about cross-border public procurements at the pre-contract stage. The conference heard examples demonstrating how this non-confrontational approach has been successful in resolving a number of cases which would otherwise end up in court or have left a complainant fuming!

The other, equally important aspect of the PPN, is as a “learning circle” on best practice. Delegates had an opportunity to learn about Gateways, and offer examples of their own approaches to managing project risk. Other topics which gave rise to lively discussion included increasing SME participation in public procurement, and new Directive provisions, including e-auctions and social/environmental issues.

Chairmanship of the PPN – and responsibility for organising the next conference (Ljubljana 2005) - will pass to Slovenia in the Spring. Now, the PPU has to absorb the many valuable comments and ideas coming out of the London conference, and communicating these. They are relevant to OGC initiatives such as raising supplier capabilities, as well as to the Procurement Policy Unit's activities in influencing policy and practice in the EU.

As one key follow-up to the event, the PPU, in liaison with Supplier and Government Marketplace Development Directorate, will be publicising the PPN's problem-solving wing to suppliers – and standing by! We will bring you further information on this in the next issue of *GC forum*.

For further information contact: Stephane.Reynolds@ogc.gsi.gov.uk [Top](#)



(l to r) Terry Love, Special Procurements Director, OGCbuying.solutions, Mike Davis, Assistant Director PP, OGC, Grainne McGuckin, PP Office, Republic of Ireland, Peter Bennett, Assistant Director PP, OGC

Achieving Excellence through Integration

The third Property & Construction Forum was held at the Royal Garden Hotel in London on 20 January 2004. The main theme was integrated team working. This report picks up on the key messages from the excellent presentations.

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GPS News

• Martin Sykes, Head of the GPS, will chair a seminar for Heads of Procurement on 24 February. It is intended to

address the many issues facing the GPS, both strategic and operational. Members should see a number of outcomes emanating from this seminar over the next 12 months.

- We have already started planning the next GPS conference and the aim is to hold it in London. Watch this space for the details.
- Changes are afoot for the Successful Delivery Skills programme which will affect the Successful Delivery Skills framework and the Skills passport. A full update of all the changes will be contained in the next edition of *GC forum*. [Top](#)

Future Events

• OGCbuying.solutions and OGC are to hold a series of seminars to update the wider public sector on the new public sector procurement EU Directive and the likely impact on procurement. The seminars will seek feedback on how OGCbs' schemes should develop under the Directive. Places are strictly limited to one delegate per organisation.

Newcastle 26th February 2004
Birmingham 31st March 2004
Exeter 28th April 2004

For further details or to register interest please email events@ogcbs.gsi.gov.uk team or telephone the OGCbs customer service desk on 0870 268 2222.

• ***Ideas into Action*** is the sixth national Invest to Save Budget event. It will be held at The Brewery, London on **18 March 2004**. The cost for the conference and workshops is £140 + VAT. For further information go to <http://www.invest-2-save.com/>

• ***Strategic Service Delivery Partnerships in Practice Conference***, on **Monday 22 March 2004** at ODPM Eland House, London SW1 is a one-day partnering conference. Phil Hope MP, Parliamentary Secretary of State, ODPM, will give a keynote address. Other confirmed speakers include Paul Kirby, Director of Transforming Public Services, Cabinet Office; Dan Corry, Director, NLGN; Phil Watson, Chief Executive, Blackburn with Darwen Council; Michael Kitts, PricewaterhouseCoopers; Martin Duffy, Head of Transportation, Buro Happold; and members of the SPT. For further information contact Rosa Napolitano, Head of Events & Marketing on tel 020 7357 0082 or at rosa@nlgn.org.uk. Please note that there are a limited number of places available at a highly subsidised rate of £40 per delegate plus VAT (incl. lunch).

• Public Sector Expo's name has changed to ***Procurement Solutions***. It has moved to Earls Court in London, takes place on **22-23 June 2004**, and runs alongside ***Government Computing Exhibition and Conference*** (<http://www.gcexpo.com>).

Procurement Solutions will have an extensive free keynote and seminar programme which will give visitors the opportunity to hear from leading experts in purchasing. Visit <http://www.procurementsolutions.gov.uk> to register.

• The Design Quality Indicator is the pioneering process to evaluate the design quality of buildings. Its development has been led by CIC with sponsorship from CABE, DTI and with support from OGC. DQI Online, the web-based version has now been launched and is available at www.dqi.org.uk. It is straightforward to initiate and easy for respondents to use. Results are obtained instantly and visualised graphically to help facilitate discussion about project aspirations, and the extent to which they have been met. To keep up to date with all our events and training workshops please visit the events page <http://www.dqi.org.uk/reception/events.htm> or contact the DQI team on 020 7399 7424, dqi@cic.org.uk

If you have any comments or would like to contribute to *GC forum*, please contact the editor on:
phone 01689 838104 or christine.barnicoat@btinternet.com

The Editorial Board Members are: Bryan Avery, Chair (OGC), Nic Hopkins (OGC), John Kitching (British Library), Sandy Flatman (The National Archives), Jason Skill (Department for Education and Skills), Sue Broyd (OGC), Suzanne Fred (OGC), Philip Cunliffe, Deputy Editor and Christine Barnicoat, Editor.

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Collaborative Working Gets Serious

For some time now collaborative procurement has been recognised as a primary route to maximising government's purchasing muscle and to achieving significant value-for-money savings. Last year, in fact, some £272 million was achieved and a target of £500 million across central government and the wider public sector over the next two years has been set. Mike Burt, Director of Collaboration and Property Co-ordination at OGC, believes that, through the Collaborative Opportunities Advisory Group (COAG), this should well be met. Philip Cunliffe talked to him to find out why.

Mike chairs the COAG and is also the SRO for the whole programme. He is also, as one can imagine, a great champion of collaborative working in government. "Successful collaboration should be the key to unlocking genuine value-for-money savings in government contracts without there being a compromise on quality," he said. And it is not just government (and, in turn, the citizen) which will benefit. Suppliers too may well benefit from collaborative projects due to a reduction in transaction costs.



The Background

Of course, the concept of collaborative opportunities has been with us for some time and has been highlighted as a primary route to achieving value for money savings on many occasions, not least in Sir Peter Gershon's 1999 review of central civil government procurement. OGC's Collaborative Opportunities (CO) team has been in place for several years and has responsibility for the overall policy and strategy on the role of collaboration as a route to effective procurement in central government departments and agencies. The establishment of COAG, however, is highly significant and has brought a more co-ordinated, strategic and focused approach, to provide the framework for better forward planning of collaborative opportunities to occur.

I asked Mike Burt to set out the historical background to the formation of the group. He said: "Traditionally, collaborative projects have been done rather reactively and in a piecemeal manner. Projects have often arisen through discussions at meetings or perhaps through approaches from suppliers but all too often the potential for collaboration has been identified too late for full advantage to be taken. This simply has to change. It is also clear that more and more initiatives are calling for further collaboration and closer working between departments."

COAG was therefore set up by OGC to provide the cross-government (and in time cross-wider public sector) assessment on collaborative opportunities, how they should be developed and taken forward, as well as how they should be monitored in terms of savings achieved. One of COAG's first tasks was to establish some key principles under which collaborative working could operate.

A paper (*The Principles of Working Together*) was prepared by the CO team and sent to COAG for consideration. The paper pointed to the need for better information provision and sharing between departments and, for each project, a clearly-identified leader. Key principles have been identified as follows:

The Key Principles for successful collaboration

- Government departments and organisations must be willing to develop their procurement programmes and projects on the presumption that these will be taken forward collaboratively, unless there are good value for money or other reasons why this should not be the case.
- Where programmes or projects have been developed for collaboration, information about these must be made available to the CO team, and through them to COAG for consideration.
- Government departments or organisations must ensure that information about their collaborative programmes or projects is kept up-to-date.
- The CO team must ensure that collated information about potential collaborative programmes or projects is made available to COAG and departments or other government organisations both for initial consideration on whether collaboration should take place, and if

so, subsequently on the progress of the individual programme or project.

- Maximum use must be made of the information sharing tools that are available now, or may be available in the future. The former is centred on the CO website which will progressively become the main channel for information flow outside of the COAG meetings. For the future, and depending on implementation, web enabled e-procurement tools and techniques may become a further primary route to capturing and using information on departmental procurement spend patterns, and therefore to potential collaborative programmes and projects.
- Following contract award, management and spend information must be monitored on an ongoing basis to measure actual savings and inform future commercial strategy.

(taken from *The Principles of Working Together*)

COAG Endorsement

Following the publication of the paper, COAG met on 17 February 2004 to discuss its recommendations. Mike Burt was delighted to tell me that all the principles had been accepted by COAG. *"This has,"* he said, *"reinforced the need to do collaboration seriously and this means providing information on all forward opportunities. The base requirement is for departments and OGC to share information about their current and future procurement strategies and work plans."*

One of the aims of COAG is to see collaborative projects link across to e-procurement initiatives being undertaken elsewhere in OGC, including the emerging project Zanzibar, the proposed new electronic marketplace. Mike Burt is also keen to see e-auctions being used far more often in collaborative projects. He said: *"There are real gains to be made from the use of e-auctions, certainly for commodity procurement. If one thinks about it, e-auctions are a form of collaboration in themselves."*

Another useful e-tool that collaborative projects can (literally) tap into is the website (www.co.ogc.gov.uk) which not only provides up-to-date information on all aspects of the initiatives, including case studies and policy updates. In addition, a simple-to-use online form, being developed by the OGC CO team in conjunction with COAG, will capture data sent by departments that have a potential project, and will provide sufficient information to allow COAG to discuss and decide whether a collaborative approach should be investigated. Mike Burt further explained: *"The key is to capture data on a consistent and common format. The form will use a commodity code (UN-SPSC) to achieve this. The information will be converted into a spreadsheet which means all the project information will be in one place and will therefore be a most valuable resource for us all to manage these projects more effectively."*

The process for each collaborative project has now been clearly set. A project is identified (either by the CO team or department or perhaps even a group of organisations) and the suggestion is sent to COAG. COAG then considers the project before either endorsing or rejecting it. If the project is given the green light, COAG will identify the lead organisation.

I asked Mike about an issue that was highlighted in the *Working Together* paper, that being whether the lead organisation should be able to charge for the added resources that it would inevitably incur. *"This was discussed at length at the latest COAG meeting,"* he said, *"There was clear acceptance that collaboration had to happen and that issues about the cost to a department of leading a project were entirely secondary to the overall 'common good' of collaborative procurement. There are significant examples of departments such as Inland Revenue and the Prison Service leading a project where the cost of doing so has been absorbed. Those departments have recognised that collaborative procurement is a key benefit to government procurement, and have just got on and done it. I commend them fully for that and for setting such a good example of how this form of procurement can be taken forward."*

The Future

Mike Burt is bullish about the prospects for success in this venture. He said: *"This is the first time that central civil government has focused strategically on this important method of procurement. The COAG Working Together principles have now been accepted and will form the platform on which we can develop this method of procurement, and take forward projects. Central government will no longer be able just to play lip service to this – it is an essential part of government procurement."*

COAG has also now agreed a communication strategy. This will raise awareness of the actions being taken by COAG, departments and the CO team, and will highlight successful collaborative projects. A boost for this is likely to come with the publication of the Gershon Efficiency Review which Mike expects will have much to say about collaborative working. So expect a regular update on progress and projects in future editions of *GC forum*.

For further information, please contact:

Mike Burt
Phone: 020 7271 2661
Email: Michael.burt@ogc.gsi.gov.uk

Stephen Haran

Phone: 0113 203 3827
Email: Stephen.haran@ogc.gsi.gov.uk

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Toolkit Successfully Updated

“It is the definitive statement of UK best practice for central and civil government”

Mike Acaster, Successful Delivery Toolkit Content and Production Manager

New OGC guidance, issued as part of version 4.5 of OGC's Successful Delivery Toolkit, was released at the end of January with CDs available in late February. The Toolkit describes proven best practice and operational guidance for procurement, programmes, projects and risk and service management. It covers the whole of OGC's policy and best practice and brings it together in a single point of reference, helping users ask critical questions about capability and project delivery, giving practical advice on improvement.

The Toolkit presents the guidance in a tiered and tailored manner which benefits users. The high-level tier provides overview information, aimed at senior management and which is available in the “Key Issues” section. The other lower levels contain more detailed material including the reference section, which has links to all the guidance OGC has published. It is tailored in that where users are interested in a particular topic, they can go direct to that area rather than search through all the guidance. There is also a tailored approach via the “Workbooks”, which is a step-by-step walk through the principles and guidance.



Version 4.5 of the Toolkit encompasses the following new major additions:

The Gateway Refresh – Guidance updated as the Gateway process has been refreshed.

Guidance on market and supplier assessment – Provides advice on understanding the capability of the market prior to issuing an OJEU notice.

CUP Guidance updates – Guides dated between 1986 and 1991 have either been updated or withdrawn.

Decision Map Operational guidance – Describes alternative procurement strategies after the Treasury announced that Private Finance Initiatives (PFI) for IT procurement are no longer appropriate.

International acclaim

The Toolkit has a wide and varied audience, by the release date there will be 3000 people registered to receive the stand-alone CD version and the website gets many hits each month. Over 250 people have requested the intranet version, as many government departments make it available to all staff. Private sector businesses, such as Norwich Union, also frequently make requests and there is a significant international audience with 25% of requests being from foreign companies including requests from Australia. The National Audit Office has distributed copies to 350 equivalent organisations around the world and parts have been translated into French for the Quebec government.

What's next?

Following the release of version 4.5 there will be a review of the effectiveness of the product. Users' feedback will be incorporated into a release strategy to understand how the information is used to make improvements to the delivery of information. In the past, versions have been released every 6 months, but due to the current review, version 5.0 may not be released for another 12 months.

For further information on the Successful Delivery Toolkit please contact:

Mike Acaster, Toolkit Content and Production Manager mailto: Michael.Acaster@ogc.gsi.gov.uk

To request a copy on CD, contact mailto: servicedesk@ogc.gsi.gov.uk

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Getting It Right From the Start

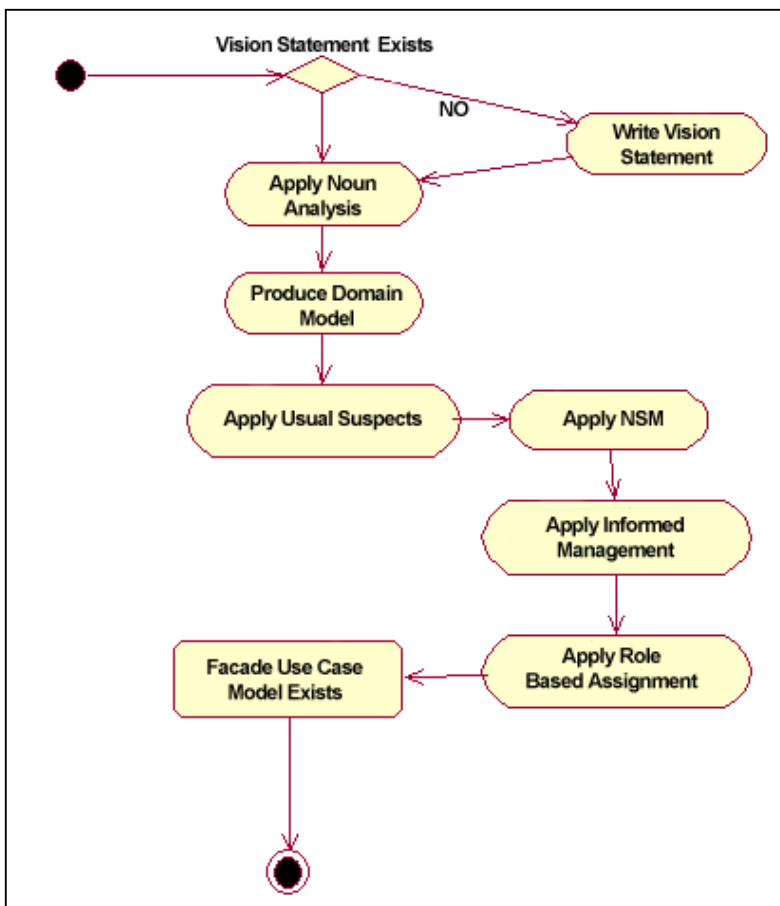
Would you like to be at the forefront of procurement research? The University of East Anglia is looking for departments with suitable projects to test-run an innovative approach to defining requirements. Peter Merrick, a researcher at UEA, explains further.




Ambiguous requirements statements and robust change procedures are problems that most purchasers have faced at one time or another. As part of my research into aspects of procurement at UEA, I have been working on an initiative to tackle these problems. The resulting approach has been developed with the help of the Learning and Skills Council and the Health and Safety Executive and complements the work being undertaken in OGC. I am now looking for a department in the process of producing an ITT and which is interested in using the methodology to define the requirements.

Much of this work was given impetus with the publication of the McCartney report in 2000 - a catalyst for providing consolidated advice and practical help to improve Government IT projects. OGC has been heavily involved in taking forward the recommendations of the report through initiatives such as SPRITE, the introduction of SROs, the Senior IT Forum and the Gateway Review process. OGC continues to explore possible improvements to contracts, some of which have led to recent revisions to the Gateway process, but despite this good work, the problem of ambiguous requirements statements and the need for robust requirements change procedures, remain. OGC's Contract Innovation team takes a close interest in new and potentially useful initiatives and the approach adopted by the University of East Anglia (UEA), Department of Computing Science, is one such initiative.

Researchers at the University have been applying the principles of requirements patterns and Use Cases (Unified Modelling Language) to produce early requirements statements quickly and accurately. Use Cases are a graphical notation that have proven less ambiguous and more successful in being understood by users and suppliers alike. In order to make progress I first had to ensure that requirements could be expressed at an appropriate and consistent level of abstraction.



This flow chart describes a repeatable process for transforming a high-level set of goals into a measurable set of requirements. The transformation takes place through the application of a set of requirements patterns, which are then applied to the



This flow chart describes a repeatable process for transforming a high-level set of goals into a measurable set of requirements. The transformation takes place through the application of a 'pattern language' which requires considerably less time than traditional approaches and appears to be a good way of capturing the problem in a less ambiguous way

To date this approach has been used successfully for the Learning and Skills Council and the Health and Safety Executive. It shows promise in allowing the customer to retain ownership of the problem statement. In addition, the tender document can be modified to form the basis of a commercial contract. A Use Case approach is also valuable in allowing an evaluation of the difference between a change and a provision of further detail. Finally, Use Cases are capable of acting as the basis of an effort estimation algorithm that can be useful in providing the customer with a transparent mechanism as to how a supplier's bid price can be verified. There are many practical advantages to employing Use Cases in requirements specification that complements the work OGC has done to date.

I am now looking for a department in the process of producing an ITT which is interested in representing their requirements through the employment of Use Cases via specialist patterns for procurement. If you have such a project or know of someone who does, I would be happy to hear from you to discuss improvements to the procurement process by defining requirements more clearly.

email: peter.merrick@uea.ac.uk

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Hope for Local Procurement

The National Strategy for Local Government Procurement, published at the end of October 2003 (see *A New Dawn for Local Government Procurement* in the December edition of *GC forum*), has set the scene for a radical shake-up in procurement for local authorities. The Government now believes the framework has been set for the next three years to deliver significant savings and improvements for the benefit of the citizen.



Speaking at a local government conference in January, Local Government Minister Phil Hope clearly stated the Government's commitment to making the Strategy work and ensuring citizens have access to world-class services from their councils. He said: *"The Strategy is about providing information and support for local authorities. It is about enabling councils and facilitating a 'mixed economy' with councils working together in partnerships with the public, private and voluntary sectors."* He added that by developing and implementing procurement strategies, councils should deliver better and more efficient procurement and, as a result, better public service delivery. *"Efficient procurement results in better quality, cost-effective services for citizens who can exercise more choice in consuming them"*, he commented.

The National Strategy was the culmination of work carried out by the National Procurement Forum (a body of 80 individuals from local and central government, plus the private sector). A question early on for that Forum was whether a national strategy was needed at all. Mr Hope explained: *"A resounding yes indicated that there was, and still is, a need to ensure that the policies from a range of government departments provide a co-ordinated and seamless policy agenda for local government procurement."*



Phil Hope, Minister
for Local
Government

Implementation

ODPM is taking the lead in pushing forward with implementation of the Strategy and has announced a range of new freedoms and flexibilities. These include the radical policy of allowing councils to borrow within "prudential limits", as well as freedom to charge and to trade within what are being described as Business Improvement Districts. Mr Hope said: *"These freedoms and flexibilities take forward the Government's commitment to work in partnership with local authorities to improve public services for the benefit of all citizens."*

Mr Hope then touched on the Government's Efficiency Review which has stated that, by 2005/06, there would be £320 billion spent on public services - much of which will be targeted through some form of procurement. Because of this, Mr Hope said it was vital that there is a major rethink into how procurement is used as a way of managing resources effectively and wisely. *"We need to consider how local government can use procurement and indeed other initiatives, such as e-government and partnering, to change the way local government thinks and operates - to generate large scale savings that can then be retargeted to the frontline,"* he explained.

Corporate Procurement

Following the publication of the Strategy, councils are being encouraged to develop effective corporate procurement strategies which will force them to review all their procurement activities whilst taking on board key messages outlined in the Strategy, all the while absorbing best practice in the process. The promotion of excellence is at the heart of the Strategy, said Mr Hope. He said: *"If local authorities can meet this challenge they will have more opportunities to generate income, develop partnering models and enjoy scope for operating outside of their boundaries. The possibilities are exciting for local government and procurement must be a part of this challenging agenda."*

A key driver for implementing the Strategy over the next few years is, according to Mr Hope, the establishment of regional centres of excellence in procurement. These centres will be based on local authorities who are able to effectively contribute towards promulgating and leading excellence in procurement. Funding for the centres is still an issue to be resolved but several authorities have already expressed interest to represent their region in this exciting venture.

Governance

Mr Hope then announced a new governance structure to implement the National Procurement Strategy. Part of

this involves communication between the Government and local authorities on implementation of the Strategy. The newly-established communications group is currently setting up a website to provide information, case studies, feedback and a notice board. Another part of the governance structure is to develop pathfinder ideas to demonstrate effective procurement – a sectoral issues group will lead in this work. In addition, a supplier forum has been set up, made up of both suppliers and local authority and government representatives. Mr Hope explained that the forum will *“understand the supplier perspective and gain an insight into selling into the public sector, how we are perceived by suppliers and how a more streamlined market approach might be achieved.”*

Although he admitted there are still certain issues to be resolved, Mr Hope urged the audience to begin the job in earnest. He concluded: *“Now it is time to implement the Strategy and realise higher standards of service delivery, through whatever procurement vehicle you choose. We have much to achieve over the next three years, but I know that it can be done.”*

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Achieving Excellence through Integration

The third Property & Construction Forum on 20 January 2004 was held at the Royal Garden Hotel in London, hosted by Arnold Butler, Director OGC Successful Delivery Property and Construction Best Practice. The theme was *Achieving Excellence through Integration*, highlighting one of the main tenets of the initiative – integrated team working.

About 75 delegates representing 26 departments heard a range of presentations demonstrating the benefits and practicalities of the integrated approach, with in-depth examination by particular contributors to the process.

John Oughton – Keynote Address

The day began with a keynote address from OGC Deputy Chief Executive, **John Oughton**. He explained where the efforts to promote and embed the Achieving Excellence in Construction initiative sat in the context of OGC's concerted and integrated approach to embedding best practice generally. The aim was to encourage departments to raise their game in the delivery of successful programmes and projects, achieve best, whole-life value for money and, ultimately, improve the delivery of public services.



At the heart of this was the establishment of a single programme of Successful Delivery (SD) embedding activity and the formation of a new Steering Group, based on the original SD Skills Community Management Board. Programme and Project Management Centres of Excellence, the PPM Specialism, the SD Skills Programme and the SD Toolkit as well as Achieving Excellence are all part of that integrated programme. He emphasised that OGC's joined-up approach also encompassed the Gateway Review process and its work in support of best practice in IT procurement, e-commerce and in the government market place.

Why integrate your team?

The next session, which had everyone joining in, took the form of a practical, light-hearted exercise with serious intent run by **Andy Jess** and **Vince Grealy** of BASIS Ltd aimed at encouraging integrated team working by demonstrating its most obvious but often ignored advantages.

A Success Story

Johnny Winter of Edward Cullinan Architects, Project Director of the award-winning Centre for Mathematical Sciences at Cambridge University, then presented an inspiring story of successful integrated working. Johnny described how the lessons learned on early phases of this challenging and complex project led to the development of a strong integrated approach in the later phases, which resulted in a patently winning outcome, delivered on time and to budget for a delighted group of users, whose unique and highly specialist demands has been met.

How do I go about it?

John Ioannou, OGC, introduced **Kevin Thomas**, Chairman of the Collaborative Working Group of Collaborating for the Built Environment and leader of the team that assembled and developed the Strategic Forum for Construction Integration Toolkit. Kevin put a personal spin on the benefits of using the Toolkit and examined the way the procurement process had moved forward from lowest cost tendering through to the integrated and collaborative approach aspired to today. He explained in simple and understandable terms how the Toolkit can be used to help and ended with his own 'top 10' shopping list to achieve success.

Health and Safety Integration

Liz Bennett presented the last session before lunch. As Chair of the Institution of Civil Engineers Health and Safety Committee, Liz was well qualified to talk about the essential need for the client to consider health and safety from the earliest stages of the construction procurement process.

Centres of Excellence and the OGC Gateway Review Process

There were two OGC presentations during the afternoon. The first featured **Liz Underhill**, Head of the Embedding Centres of Excellence Division, who described the background to the establishment of COEs, their evolving remit, the associated roles and responsibilities and the work OGC does to support them.

Ian Glenday, Director of Gateway, provided an update on the OGC Gateway Review Process and passed on the key generic lessons learned from Gateway reviews completed to date. These included many of the issues that those involved in construction procurement will recognise from the failures of construction projects in the past and which Accelerating Change and Achieving Excellence in Construction are aiming to rectify. Ian made a particular point that Gateway reviews are as equally applicable to property and construction projects as other procurements.

Integration of the Supply Team

The Highways Agency is renowned for being at the forefront of innovative moves to integrate its supply teams as part of their procurement strategy. It was therefore highly appropriate that **Gary Wright**, HA Supply Team Manager accepted an invitation to address this Forum to explain how that is being achieved and with what success. His presentation described the challenge faced by HA and the approaches being adopted at each stage of the procurement process – from basic principles through to the benefits realised.

Design Quality Indicator Online

Design was the final example of essential elements of the integrated procurement team chosen for coverage at this Forum. **Robin Nicholson**, senior director at Edward Cullinan Architects and a CABE Commissioner, spoke passionately about the work that has been done to establish the Design Quality Indicator online tool. He explained that this web-based facility is intended to bring about a better understanding of what design is by helping the client team to establish their aspirations and for the design team to identify any diverging views. The tool helps to develop a shared language for a project and provides the basis for a measure of the project's success against the client's original aspirations.

Stop Press

Arnold Butler had one piece of 'stop press' news that he announced before closing the Forum. He told the audience that, following wide consultation, the supporting technical note covering the detailed definitions of the Achieving Excellence Strategic Targets would be issued in February. This would facilitate measurement of progress towards achievement of the Targets at the end of the first year.

Feedback

Formal analysis of the feedback sheets returned on the day confirmed the feeling of the organisers - based on the 'buzz' and active participation of delegates - that this Forum was a success, providing information that was relevant, that contributed to understanding of the issues covered and which would be helpful in achieving departmental objectives - all that and a good cross-government networking opportunity.

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