

ACTIVITY	Owner(s)	Timescale	RAG
PLANNING & GOVERNANCE			
CPRs			
- Procurement review			
- Legal review			
- Interim changes			
- Comprehensive re-write	SMT/ legal		
Gateway approval process			
- Update documents	SMT		
- Payment compliance notice			
PREPARATION			
Internal guidance - intranet & other			
- New notices			
- New processes (e.g. contract modifications)			
- New tools (e.g. Dynamic Markets, Open FWs)			
- Process flow-charts (e.g. post award & contract management)			
- Ticklists/ checks			
Templates - external			
<u>Optional templates from Cabinet Office</u>			
- Conflicts assessment			
- Conflicts of interest declarations			
- Pre-procurement checklist			
- Sourcing strategy			
- ITT pack (CFP & tender assessment)			
- Direct award justification			
- Contract award			
- Procurement specific questionnaire (conditions of participation)			
Templates - internal			
<u>Internal procurement templates</u>			
- Preliminary Market Engagement			
- Assessment Summary			
- Conditions of participation			
Group guidance and other documents			
- Estimating the value of a contract (PA23 Schd.3)			
- Mandatory and discretionary exclusions (PA23 Schd.6 & 7)			
- Setting KPIs & assessing performance			
- Setting award criteria			
- Excluding suppliers			
- Direct awards (PA23 Schd.5)			
- Contract modifications (PA23 Schd.8)			
- Procurement & contract terminations			
- Regulated below-threshold contracts			
- Record keeping			
LEARNING & DEVELOPMENT			
TPP e-learning	ProcServ		
DIGITAL & SYSTEMS			
InTend			
Work with our e-sender (InTend)			
- Read Intend weekly PA23 bulletins			
Notices			
- Systems for tracking notices			
Contract modifications			
- Systems for tracking modifications			
Performance			
- Assessing performance			
- Poor performance reporting (link to KPI Intend scores?)			
- Exclusion for prior poor performance			
COMMUNICATIONS & ENGAGEMENT			
Internal communications			
- Part 1 - All managers, email - Jul24	KR		
Internal webpages			
Supplier communications			
- CDP registration			
POST GO LIVE			
Pipeline notice			
- Publish first Pipeline Notice	SMT	Apr-25	
Develop procurement strategy and policy			
Link to updated financial rules training, approval levels, etc, risks with lower level spend, schemes of delegation			
CIPFA bespoke training - Finance and audit (controls)			
Aggregated spend data from Fusion - Paul Somerset and Liz B			