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# Interim Evaluation of Transforming Procurement through Home Grown Talent
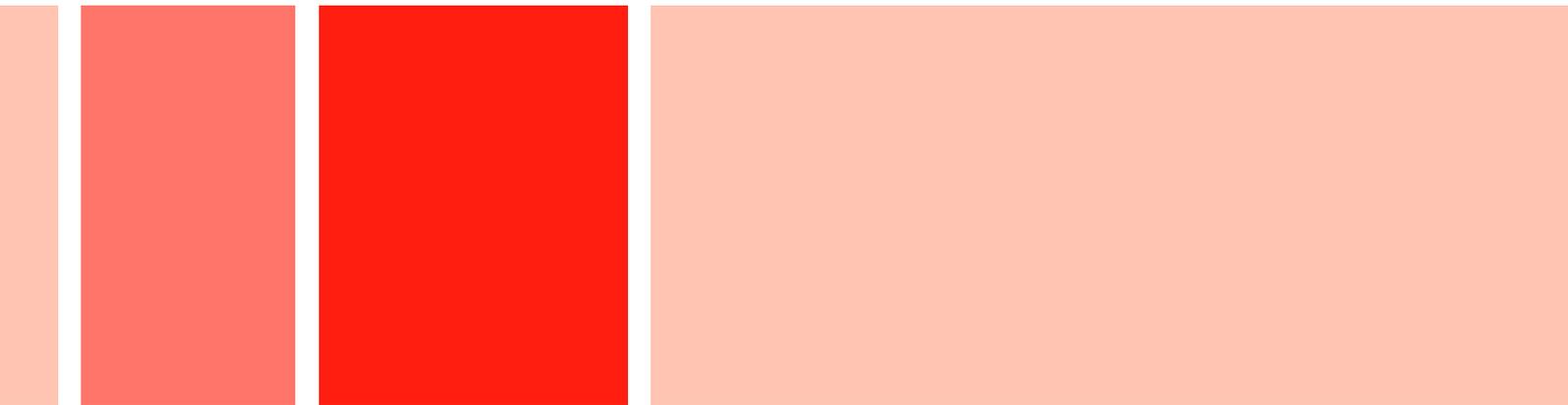
# Interim Evaluation of Transforming Procurement through Home Grown Talent

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## Executive Summary

### Background

1. Transforming Procurement through Home Grown Talent (HGT) is an £11 million programme running from 2010 to 2015 (with £5.7 million from the European Social Fund (ESF) Convergence Area Programme).  Its purpose is to raise procurement skills and capability across the Welsh public sector.

2. It is being managed by Value Wales, a division of the Welsh Government which supports other organisations in the Welsh public sector and public services[1] to improve the efficiency and effectiveness of commissioning public services in Wales.

3. There are five strands to the programme, although not all have commenced delivery. As a result, this evaluation focusses on a programme of up-skilling for those already in the sector (Strand 2), delivery of a Trainee Procurement Executive Programme (TPEP) (Strand 3), and funding and assistance for organisations to develop their e-procurement capacity (Strand 4).

### The interim evaluation

4. There were three overall aims of this interim evaluation:

- To assess progress with the programme's inputs and activities over its first two years, including an assessment of the outcomes and impacts of the training delivered in Strand 2, the TPEP delivered as Strand 3, and the financial assistance delivered in Strand 4;

- To provide lessons for improving the delivery of the project, including understanding what has helped or hindered progress, and identifying

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[1] In this report, 'public sector' will be used to encompass the Welsh Government and its agencies, local government, NHS organisations, and public services, such as the fire service and national park authorities.

areas for improvement (in relation to achieving the expected outputs and outcomes); and

- To identify practical means to evaluate the impact of the project upon its completion in 2015.

**Method**

5. A logic model was produced based on the business case and targets developed for the programme which was used to develop an evaluation framework (see Annex 1). The main research tasks were as follows.

- A short e-survey distributed to all beneficiaries of training and workshops in Strand 2 delivered as part of the programme. 49% of participants up to March 2013 responded;

- Interviews of 12 of the 22 Strand 3 trainees selected to ensure each cohort was equally represented and to have a spread of public sector organisations involved in Strand 3;

- Interviews with the trainees' current line manager, and in some cases the mentor (who stays with them throughout the programme);

- Short case studies on four of the five organisations which have received funding from HGT to implement e-procurement projects;

- Telephone interviews with six key programme stakeholders with an interest in the programme to understand its relevance and wider impact and four delivery partners to understand how the strands of the programme were being delivered;

- Telephone interviews with three organisations which had unsuccessful bids to participate in the TPEP;

- Telephone and face to face interviews with Value Wales staff managing and delivering the HGT programme; and

- Analysis of the programme's management information (MI) to understand the main characteristics of the beneficiaries of Strand 2 and the take up of courses.

**Key Findings**

**Development and delivery of the programme**

6. The HGT programme fits well with the challenges identified in the McClelland review of public procurement in Wales. Improving procurement is a key issue for public services in Wales and underpins progress towards greater collaboration and shared services within the public sector as well as increasing value for money and providing efficiencies and economies. It is recognised that skill gaps and shortages exist in procurement within the public sector as a whole, but particularly local authorities, which reduce the capacity to respond to these challenges.

7. The HGT programme has been designed to address some of these challenges in its five project strands alongside the continuing work led by Value Wales and by existing collaboration and consortiums in the public sector. The programme is broadly on target to achieve most of the targets which have been set as a condition of European Social Fund (ESF) funding towards the programme.

**Strand 2: training courses and workshops**

8. A varied range of training courses have been provided which cover the expected range of knowledge and skills needed by both specialist and non-specialist staff engaged in public sector procurement. So far, 328 different public sector staff have been on over 42 different training courses and 39 different workshops/meetings. With over 743 attendances recorded, many have attended more than one course or meeting/workshop.

*The beneficiaries*

9. On the basis of the roles reported by attendees, around a third of those in specialist procurement roles in the public sector in Wales have participated. Those in non-specialist procurement roles who have attended (160) are a very small proportion of such staff in the public sector who have responsibilities for commissioning works and services.

10. Over half the beneficiaries are female (57%), most are in mid-career (56%, and relatively more than the general population could speak Welsh (28%). Most beneficiaries are well-qualified with prior qualifications at level 4 and above (83%) and are split roughly equally between specialist staff (43%) and non-specialists (41%) which indicates a broad appeal.

11. While the Convergence area accounts for most of the beneficiaries (81%), these are not evenly spread or representative of the spread of the public sector workforce. Some local authority areas account for many more than others. This is partly because of the local authorities themselves taking places and the location of Welsh Government offices and agencies but must be partly because of differential levels of take up by eligible organisations which cannot be explained. Local authorities account for more attendees (43%) than the NHS (14%), and other services (14%). The Welsh Government and agencies accounted for 22%. Some interviewees have indicated that the availability of the courses is not well known and may not reflect the needs of different groups of staff who the programme is aimed at. Some courses have been provided before the HGT programme so many specialist staff may have attended already.

***Views on the training and meeting/workshops***

12. Most attendees chose the course themselves and most of them did so because of *"interest in the subject"*. Only 41% attended a course because it filled a skill gap.

13. In all respects, participants were mainly satisfied with the delivery of the training/workshop. Generally there were fewer than 10% who were not. Some made a few suggestions for improvement about delivery including time, information and location. Most were also positive about the relevance

of the training or workshop to their job, role and organisation (80% or more), although smaller proportions, albeit the majority, felt that it addressed a skill or capability they lacked (58%).

14. Nearly all attendees improved their knowledge and skills in the area covered by the training or workshop they took part in (84%) though fewer (38%) believed that the training or workshop has made them more productive i.e. improved their competence. This might be expected for relatively short courses. With regard to impact, a majority only reported that the training/workshop had improved procurement practices (53%) and the support given to non-specialists (54%); only around a third believed that the training/workshop had influenced supplier management processes (32%), for example, and contracting procedures (41%).

**Strand 3: the Trainee Procurement Executive Programme**

*Recruitment and allocation*

15. Two cohorts have been recruited (22 in total) with 18 remaining and progressing; five have taken up jobs in procurement. A third smaller cohort will be recruited shortly to start in the late summer. Public sector organisations were invited to bid for year-long secondments setting out the work they could offer the trainees. Eighteen different organisations have had trainees. Several organisations have questioned the transparency of this process.

16. There has been an even split of secondments between national and local/regional organisations with most of the former in Value Wales (6) and the NHS Shared Service Partnership (5) and most of the latter in local authorities (11) only one of which has been in North Wales. Most organisations sought the trainee because they saw value in the programme and could identify project activities which they could not do with their current resources.

17. Some host organisations have indicated that communications about the process, the training offered to trainees and the needs of trainees could

have ensured they were better able to meet trainees' expectations. A pre-secondment meeting has been proposed. Trainees are supported by a line manager in the host organisation as well as the Professional Development Manager in Value Wales and a mentor in another organisation who are expected to monitor the trainees' training and development plans. Trainees were generally satisfied with the recruitment process and support.

### *Views on the training and work on secondments*

18. The trainees have mixed views about the extent that the introductory training provided knowledge and understanding before it would be useful to them; for some it was too early and too long. The first cohort generally felt that the ILM and CMI courses were not needed at the start although a few have found some value in the ILM course subsequently. Trainees were most positive about the Prince 2 training; line managers believed that the trainees were prepared to start although they would have benefited from information about the induction process;

19. Trainees are generally satisfied with the content of the CIPS training, its relevance to the work they are doing and the opportunities to apply the learning that they have. No alternative has been offered to the trainees who already have these qualifications, such as shorter more advanced courses.

20. Most trainees are satisfied with the secondment experiences they have had (although this has not been so in all cases even though the Professional Development Manager and mentor are there to put it on track), what they are learning, and what they are contributing to. Line managers are generally pleased with their contributions and the added value they bring.

21. Most trainees are participating in procurement activities which are contributing to the added value which procurement is expected to provide to public sector organisations and some of the key activities to improve public sector procurement in Wales. Most also appear to be getting a good

grounding in procurement activities and taking responsibility for activities with close supervision.

**Strand 4: funding for e-procurement projects**

22. Strand 4 has funded five projects which aim to implement e-procurement solutions to Welsh public sector organisations' purchasing activities. Funding for these projects ranges from around £25,000 up to £150,000 which is generally more than matched by the organisation's investment.

23. According to bidders the application process was relatively straightforward with substantial support being provided by Value Wales. However it is not clear how well advertised the funding has been to attract bids from organisations that are not progressing e-procurement solutions which can unlock economies and efficiencies in purchasing.

24. It appears that the funding has either accelerated activity that would have taken place at some point in the future (as a result of government targets to increase use of electronic procurement tools in Wales) or, funded activity that would not have been supported at the same scale from the organisations' own resources.

25. All projects are still at a relatively early stage of delivery so the outcomes and impacts to be achieved are some way off, although the potential benefits are recognised in the organisations. Projects could benefit from being accelerated if they were better resourced and several would benefit from supplier enablement of on-line catalogues, electronic orders and invoices.

**Conclusions**

*Overview of the programme*

26. Three strands of the HGT programme have progressed. The training for existing purchasing staff (Strand 2) and the traineeships (Strand 3) have been taken forward successfully. Grants to assist public sector organisations to adopt and use e-procurement tools appear to have been

more slowly and less widely taken up. As a consequence, the HGT programme is broadly on schedule to achieve its ESF targets except for the total number of participants. Some action is needed to involve more specialist and non-specialist procurement staff in Strand 2 training to achieve the target.

27. It is evident that the programme is making a contribution to the objectives of Priority 4 ESF Convergence area funding. Its support for workshops, skills training and enabling e-procurement are evidently contributing to public sector collaboration in procurement in some of the public sector organisations. Participants have or expect to have benefits which enable collaborative commissioning. Its support for trainees and up-skilling public sector employees who are engaged in procurement is evidently contributing to building the capacity of the public sector workforce to be more effective. Participants have gained relevant knowledge and skills and the trainees have brought new entrants who are quickly trained up in the sector.

28. At this point what is more difficult to discern is what impact the programme is having on the organisations which have participated in enabling collaboration and more effective purchasing. In part this is because the medium term outcomes as set out in the logic model (Annex 1) have not yet been achieved; in part because the programme provides only elements of a wider programme in Value Wales which is working towards these outcomes.

29. The HGT programme is also making a contribution to the Welsh Government's policy direction for procurement and is addressing some of the concerns raised by the McClelland review since the start of the programme. There continues to be a strong rationale for the programme to make an impression on the capacity and quality of purchasing specialists and non-specialists.

30. In particular it is evident that the programme is:

- successfully training up new entrants to specialist purchasing roles and engaging many of them in work which is focussed in improving the value for money of public sector procurement. Trainees report significant skill gains from their secondments which are supplemented by a range of high level training courses. Skills acquired in this training are, in most cases, being utilised in the secondments. Organisations that host trainees are gaining from their work and speedy learning, especially where trainees are able to work on projects independently;

- enabling training for the current workforce which is linked to e-procurement and should improve efficiency and enable collaborative and aggregate purchasing across the public sector. New training has been offered, training has been taken up by some non-specialists, and most have valued and benefited from the training; and

- assisting areas of the public sector which have not progressed e-procurement to take positive steps which are in most cases beginning to yield some of the expected benefits. More significant impacts should be expected as they are fully implemented.

31. At this point it is more difficult to discern the extent that the programme provides added value (especially for Strands 2 and 4) and it has reached employees and organisations in greatest need. For example:

- while the small value grants in Strand 4 have assisted, they have not necessarily been deal breakers for e-procurement; larger grants would enable speedier implementation and change management;

- much of the training offered in Strand 2 is not new nor expensive so it is difficult to assess how much additional training has been taken up. It is accepted that some have been induced to take up training they would not have done (and benefited from it);

- the spread of trained public sector staff suggests that some areas/sectors have not participated as much as others;

- it is not possible to check the extent that organisations and individuals with training needs have participated in appropriate training;

- only a minority (38%) of participants in training report that the training has increased their competence by becoming more productive which would be likely to have an impact on their work; and

- only NHS and local authority organisations are yet to benefit from the grants.

**Responding to the aims of the interim evaluation**

***Progress with the programme's inputs, actions, outputs and outcomes***

32. The programme is broadly on target to achieve the required ESF deliverables with the number of employers assisted already achieved, over half the participants in training courses achieved and the secondments on course subject to further recruitment this year. To increase the total number of participants Strand 2 needs to reach out to more specialist and non-specialist staff although Strands 1 and 5 should be expected to contribute to this target over the next two years.

33. Against the outputs and outcomes in the logic model there is strong evidence that:

- Training beneficiaries have generally improved their knowledge and skills; many have applied what they have gained;

- The trainees have mostly gained competences that are enabling them to make a contribution to desired improvements in procurement; most appear to be committed to using the knowledge and skills they are acquiring to work in the sector as procurement specialists; and

- A few public sector organisations are being enabled to utilise e-procurement solutions.

34. As yet medium term outcomes have not yet been secured although Strands 3 and 4 should be expected to achieve these. Strand 2 will also

achieve these if the training and meetings have a cumulative effect on participants' competences which can be exploited by public sector organisations. More targeted and intensive training for specialist and non-specialist staff may assist this.

**Lessons for improving the delivery of the programme**

35. There are a few ways in which each strand could be managed differently to improve their effectiveness and the outcomes achieved. Learning appears to be taken on board in the way the programme strands have been adapted in the first three years so this should not present a problem.

36. In Strand 2 it is important for Value Wales to ensure that the training is targeted on those with skills needs in procurement roles (both specialist and non-specialist) and that the learning contributes, as well as Strand 3, to raising the profile and capability of staff who work on procurement throughout the public sector, preparing the leaders of tomorrow who are already within roles, and providing the competence to apply learning to making improvements from procurement. A greater depth of training and participation is likely to have a bigger impact. As a consequence in Strand 2:

- The process of advertising the training opportunities should be reviewed to ensure all relevant organisations, and staff within them, are aware of the training; many will not be procurement specialists;

- Courses and other activities should be clearly marked for the target learner (experience, role, learning outcomes expected) so that they address skill needs which have a high likelihood of being used in the workplace. The provider should undertake screening if this is not already in place;

- Future training should be focused on new skill gaps identified based on the competency framework being developed by Value Wales and responses to the intended fitness reviews;

- Monitoring information should capture details of the attendees and the courses to enable a fuller analysis to test the appropriateness of take up and the relationship between the depth of training activities and learner outcomes; and

- Workshops should better demonstrate action learning and contributions to networks and collaborative purchasing initiatives.

37. It will be important for Strand 1 to enable greater opportunities for procurement specialists and ensure training is used in public sector organisations.

38. In Strand 3 it is important for Value Wales to ensure that the secondments make contributions across the public sector in organisations which need to make progress as well as providing all the trainees with skills and appropriate opportunities. In the main this has been achieved but focusing all placements on activities to take forward purchasing across Wales will help with potential sustainability and securing a return on the investment. As a consequence in Strand 3:

- The process for selecting secondment organisations should be explained to all potential bidders with an emphasis on providing supported learning experiences as well as contributing to a public sector organisation's improvement plan for procurement;

- Fewer placements should be in Value Wales;

- Information about the traineeship and the trainee should be provided to secondment organisations in advance of trainees arriving with a pre-secondment meeting to start to shape the trainee's work, training and development programme alongside the programme manager; and

- ILM and CPM training should be offered later in the programme.

39. In Strand 4, it is important for Value Wales to ensure that the grants make a difference to the pace of the implementation of e-procurement and the use of the tools and capabilities (complemented by the training available).

Larger grants and collaborative grants may help to ensure this. As a consequence in Strand 4:

- The process of promoting the grants should be reviewed to ensure that all eligible organisations across the public sector that have needs to accelerate implementation and use of e-procurement are aware of the funding opportunities and assisted to put together bids;

- Grants which will enable non-procurement specialists to accelerate implementation or release procurement specialists to undertake projects (through backfilling their other roles) would assist the process of change management in public sector organisations; and

- Projects need to be able to monitor the outcomes and impacts of the systems they have introduced so should be guided on this.

40. **We would recommend that Value Wales and the HGT programme board consider the actions suggested above to improve the effectiveness, impact and added value of the current strands of activity in the programme.**

*Practical means to establish the impact of the programme upon its completion*

41. The final evaluation will need to evidence the programme's progress towards the medium term outcomes and contribution to impacts in the logic model, that the programme has provided added value, and whether it has made a sustained difference to procurement in Wales. Much of the necessary information is being collected but we have found from completing the interim evaluation that the training course MI needs to be added to and any survey of Strand 2 beneficiaries should separate training from meetings and workshops. As a consequence we would suggest:

- Strand 2 MI should include information on the participants' role and experience to enable analysis of the benefits and the appropriateness of courses for attendees with further information about the courses

themselves; any accreditation or testing of attendees; length of course; whether part of a series or are delivered separately; key learning outcomes; and level/experience of expected participants;

- The following should be collected on Strand 3 trainees (qualification achievements, any progression to jobs with a post departure six month check up);

- Grant aided organisations should be advised to be able to demonstrate achievements including savings as a result of their implementation of e-procurement tools;

- Having a separate survey or a sample of interviews to cover outputs and outcomes of the Strand 2 meetings/workshops since these should be expected to have different outcomes to training;

- Continuing to interview a sample of trainees and line managers/mentors about the value of the training and secondments and the impact they have had in the organisations they have been placed;

- Adopting a case study approach to the grants so that a wider range of the longer term outcomes which should be achieved over two years can be captured in the organisations and their partners that have not taken place in the timescale of this evaluation; and

- Engaging a wider range of stakeholders (heads of procurement, senior managers of public sector bodies with oversight of savings and procurement efficiencies and economies and collaborations, leaders of all the networks of procurement professionals in the public sector) to provide corroboration of impact and added value.

42. With an expectation that all public sector organisations in the Convergence Area and most outside will have benefited a counterfactual cannot be established. However in selecting organisations to interview about the

programme's impact, those who have heavily participated and those which have not should be compared.

43. **We would recommend that the HGT programme team in Value Wales take steps to ensure the MI required for a final evaluation is collected as set out above and that the Welsh Government note the other elements needed for a final evaluation.**

# 1  Introduction

1.1   This is the final report for the interim evaluation of the Transforming Procurement through Home Grown Talent programme. It draws on evidence from primary research with beneficiaries, the line managers and mentors of the trainees, stakeholders with a direct interest in the policy area, and organisations involved in managing and delivering the training. The study commenced in December 2012 and the fieldwork was completed in April 2013.

**Background to the evaluation**

1.2   Transforming Procurement through Home Grown Talent (HGT) is an £11 million programme running from 2010 to 2015 (with £5.7 million from the European Social Fund (ESF) Convergence Area Programme).  Its purpose is to raise procurement skills and capability across the Welsh public sector.

1.3   It is being managed by Value Wales, a division of the Welsh Government which supports other organisations in the Welsh public sector and public services[2] to improve the efficiency and effectiveness of commissioning public services in Wales.

1.4   One of its aims is to increase the capability of procurement specialists working in the public sector and the quality of new entrants (as well as address the shortage of procurement specialists). It also aims to accelerate the use of e-procurement tools and the knowledge and understanding of senior managers about smarter procurement.

1.5   As a consequence, HGT provides training opportunities for new entrants to the profession and those already in place, work experience for new entrants, funding for public sector organisations wishing to develop their e-procurement capacity, awareness raising

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[2] In this report, 'public sector' will be used to encompass the Welsh Government and its agencies, local government, NHS organisations, and public services, such as the fire service and national park authorities.

among senior public sector staff about the role of procurement in helping them achieve their organisations' objectives, and research which seeks to enhance the capacity and status of the procurement function in public sector organisations in Wales. There are five strands to the programme, although not all have commenced delivery. As a result, this evaluation focussed on a programme of up-skilling for those already in the sector (Strand 2), delivery of a Trainee Procurement Executive Programme (Strand 3), and funding and assistance for organisations to develop their e-procurement capacity (Strand 4).

**Evaluation aims and objectives**

1.6 There are three overall aims of this interim evaluation:

- To **assess progress with the programme's inputs and activities** over its first two years, including an assessment of the outcomes and impacts of the training delivered in Strand 2, the Trainee Procurement Executive Programme (TPEP) delivered as Strand 3, and the financial assistance delivered in Strand 4;

- To **provide lessons for improving the delivery of the project**, including understanding what has helped or hindered progress, identifying areas for improvement (in relation to achieving the expected outputs and outcomes); and

- To **identify practical means to evaluate the impact of the project** upon its completion in 2015.

1.7 A more detailed set of evaluation questions were agreed in the inception report:

- Are the programme's original aims and objectives still relevant?

- Is the project delivering its expected activities, outputs and outcomes at this stage?

- Is the project on track to deliver its expected final outputs and outcomes?

- What could be done to improve the project's efficiency and effectiveness in producing its outputs and outcomes?

- Is the project making a difference to what might have been expected if the programme were not in place?

- What should be learnt from the approach to the interim evaluation for the final evaluation?

**Evaluation methodology**

1.8 To develop the evaluation framework and the research tools, a scoping stage of research was carried out which included:

- Collection and analysis of programme documentation;

- Assessment of the management information (MI) being collected; and

- Scoping interviews with programme managers (4) to develop a more in depth understanding of the programme development and delivery.

1.9 Based on these scoping tasks, a logic model was produced for the entire programme which was used to develop an evaluation framework. This framework underpins the whole approach and informed all research tools. The logic model and evaluation framework are in **Error! Reference source not found.**.

1.10 The main research tasks were as follows.

- A short e-survey distributed to **all beneficiaries of training or workshops in Strand 2** delivered as part of the programme. There were 160 responses to this survey, which represented nearly a half (49%) of those who had participated up to March 2013;

- Interviews of a **sample of 12 of the Strand 3 trainees** (there have been 22 to date) selected to ensure each cohort was equally represented and to have a spread of public sector organisations involved in Strand 3;

- Interviews with the **current line manager and in some cases the mentor** (who stays with them throughout the programme) of the trainee. In total, 10 line managers, and five mentors were interviewed;[3]

- Short case studies on **four of the five organisations which have received funding from HGT** to implement e-procurement projects. These were either undertaken in a face-to-face visit, or (in one case) as a telephone interview. The case study sites were: NHS Wales Shared Services Partnership; Neath Port Talbot County Borough Council; Conwy County Borough Council; and Merthyr Tydfil County Borough Council (by telephone). The fifth site – Denbighshire CBC – did not respond to a request for an interview;

- Telephone interviews with **six key programme stakeholders** with an interest in the programme to understand its relevance and wider impact and four delivery partners to understand how the strands of the programme were being delivered;

- Telephone interviews with three **organisations which had unsuccessful bids** to participate in the TPEP: Coleg Llandrillo, Powys County Council, and Ceredigion County Council;

- Telephone and face to face interviews with **Value Wales** staff managing and delivering the HGT programme; and

- **Analysis of the programme MI** to understand the main characteristics of the beneficiaries of Strand 2. Of the 356 beneficiaries of Strand 2, there are completed participant enrolment and achievement forms for 328.

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[3] Two line managers declined to take part; the remaining mentors were either not considered to be relevant for an interview by the trainee (as their line manager and mentor was the same person); a few also declined to take part.

1.11 0 lists the interviewees; 0 contains the topic guides.

1.12 Given the need to consider research for the final evaluation, some reflections on the methods and intentions can be drawn out:

- The survey respondents are broadly representative of the participants (gender, role, part of public sector, see Annex 3 analysis) and sufficiently large for analysis[4]. Because we found from the scoping that none had participated in longer qualification bearing courses we decided against interviewing. Since finding from the MI that some had participated in workshops over a longer period these might have been better sample interviewed than provided with a survey more suitable to reflect on training;

- The survey did not capture the amount and type of training that respondents attended to enable perceptions and views to be related and compared more directly to experiences;

- Line managers and mentors provided useful insights, although they can be difficult to engage in qualitative research because some are not prepared to give up time for an interview. In this instance the line managers are essential interviewees;

- The programme MI could be improved to enable analysis of the benefits and the appropriateness of courses for attendees with further information about the courses themselves such as any accreditation or testing of attendees; length of course; whether part of a series or are delivered separately; key learning outcomes, and the level and experience of expected participants;

- We tried to identify and engage public sector organisations which had not participated in either Strands 3 or 4 of the programme to provide insight into why they have not taken part and their awareness of the programme. We approached Blaenau Gwent, Anglesey, and Flintshire local authorities but could not get an agreement to participate in a short

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[4] At the 95% confidence level the response provides a confidence interval of 5%.

interview. The MI suggests that use of Strand 2 courses has also been variable so that it would be useful in the final evaluation to consider interviews of heads of procurement in organisations with little and a lot of use of the training to identify reasons and how, for the low users, they develop staff in the absence of the programme (which would provide some indication of its additionality); and

- Questions about the processes for managing and delivering each of the Strands have arisen from the interviews and survey analysis which suggest that those managing the programme should be re-interviewed before this report is finalised.

**Structure of this report**

1.13 This remainder of this report is as follows:

- Chapter 2 is a summary of the policy context in which the HGT programme was designed and has been implemented;

- Chapter 3 presents findings on Strand 2;

- Chapter 4 presents findings on Strand 3;

- Chapter 5 presents findings on Strand 4;

- Chapter 6 presents our conclusions, from addressing the evidence against the questions posed for the evaluation, and some recommendations.

## 2  Background to the Transforming Procurement through Home Grown Talent programme

2.1  This chapter describes the context in which the HGT programme was developed and implemented and sets out its rationale, objectives, funding and ESF targets agreed.  This chapter draws on an analysis of programme documentation and interviews with key programme stakeholders.

**Background to the programme**

2.2  The Welsh Government, through the public services and agencies it funds, spends £4.3 billion a year on external goods and services.  The processes behind the spending of this money have an effect on the outcomes expected:

2.3  "How we carry out this procurement, has a major impact on the value we gain from the expenditure and our ability to secure wider social, economic and environmental benefit for Wales"[5].

2.4  In a context of tightening public sector budgets, in recent years the focus has intensified on how public organisations spend their funding, and whether economies and efficiencies can be found.  Across Wales and the rest of the UK, there have been several reports outlining the challenges facing public sector procurement. In Wales, for example, the Simpson report[6] recommended developing greater collaboration and shared services at local, regional and national levels; developing the leadership capacity and culture of the procurement profession; and investing in the processes used (in particular electronic solutions) to ensure that cost benefits could be realised in purchasing.

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[5] E&I Procurement Taskforce (2011), *Beyond Boundaries: Citizen-centred local services for Wales*

[6] Simpson, J (2011), *Local, Regional, National: What services are best delivered where?*

2.5    Other reports have noted that there are significant skill and capacity issues to be addressed[7]. Audit Scotland, for example, published a study which examined the impact of a set of activities to improve the efficiency and effectiveness of activities to improve purchasing in the public sector. It found that the Scottish Government was taking several steps to improve skills including: introducing a staff development programme, improving training opportunities with the Chartered Institute for Purchasing and Supply (CIPS), and introducing competency guidelines to help public bodies to recruit staff in this area[8].

2.6    These skill and capacity issues have also been noted in Wales, and they are not new; since the Beecham Review, published in 2006, a common thread in public sector reform in Wales has been to enhance the efficiency and use of resources by public services. The Review noted that, "Procurement and contracting skills are a key capacity constraint identified in the evidence."[9]

2.7    However despite positive steps to improve procurement practices (including collaborations for purchasing in some areas, production of guidance to public services, the development of the Welsh purchasing card, assistance with CIPS training, and the development of e-procurement through xchangewales) which have been led by Value Wales[10] significant challenges still remain. The Welsh Government's Efficiency and Innovation (E&I) Board[11] reported in 2011, there are

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[7] See, for example, Gershon, P (2004), *Releasing resources to the frontline: independent review of public sector efficiency*
[8] Audit Scotland (2009), *Improving public sector purchasing*, p. 28
[9] Beecham, J (2006), *Beyond Boundaries: Citizen-centred local services for Wales*
[10] These have also included a collaborative procurement programme which includes category purchases and support for some public sector collaborations for purchasing between local authorities, such as SEWIC for social care, and within the NHS, Further and Higher Education which have been established in the last five years. The Invest to Save fund overseen by the E&I Programme Board has also resourced over 50 improvement projects with cross public service involvement. These have included projects to achieve improved procurement through collaboration and applying better approaches to purchasing such as NHS Mental Health Services which has developed a framework agreement of approved care providers for a specific group of patients which has provided a more efficient system for acquiring providers and reduced costs per patient.
[11] E&I Procurement Taskforce (2011), *Buying smarter in tougher times*

shortages of procurement specialists, particularly in local authorities and weaknesses in drafting specifications and managing contracts.

2.8 The take-up of e-tools and use of xchangewales's resources has been slow, and this has created a gap in capability between organisations that have invested in electronic solutions and those that have not (and this gap also reduces the likelihood of collaboration). It is also reported that: "*Procurement officers lack the influence, confidence, or position to challenge and drive change*".

2.9 The McClelland Review of public procurement for the Welsh Government in 2012 highlighted many persistent problems. In a section on 'procurement capability', the Review looked at the numbers of staff within designated procurement functions / departments, and the skill levels and qualifications of these staff. It concludes that against benchmarks developed in previous studies, in Wales "there is a deficit in resources"[12] in numerical terms (although this differs across the public sector[13]). Less than one-third of procurement staff in the Welsh public sector were found to be members of CIPS (and not all members are fully qualified). It concluded that the position of the procurement function in relation to chief executives and heads of finance in public sector organisations has a significant impact on their effectiveness. In Wales, this position is variable.

2.10 Stakeholders interviewed as part of the programme were familiar with these challenges summarising that public sector procurement faced three related needs. These are:

- A shortage of skilled procurement staff when measured against the ratio of spend per staff member set out in the McClelland report (that were reported by one senior stakeholder to *"feel about right from my experience in the private sector")*;

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[12] McClelland, J (2012), *Maximising the impact of Welsh procurement policy*, p. 29
[13] McClelland reports that the health services and the FE and HE sectors are the best resourced in terms of numbers of procurement staff relative to spend, whereas Value Wales, and the local authorities are under-resourced in these terms.

- Skill gaps among both specialist procurement staff and staff who are involved in buying goods, works or services as part of a broader job role. Among specialist staff, skills in post-contract award management, ongoing supplier engagement, and leadership and management skills were highlighted as gaps. For non-specialist staff, gaps in more basic procurement skills (drafting tenders, contracting, assessing bids) were noted; and

- A relatively low status of specialist procurement staff within public sector organisations – there is an unmet need, stakeholders considered, to *"get public sector leaders to invest in professional procurement"* and also to "*sign up to the vision and strategy of the central procurement function*". The relative position of procurement staff against other specialist support staff in public sector organisations, such as accountants and solicitors was also noted as a key issue: *"You can see a risk averse culture growing up... a lot of this is because procurement professionals are too junior... there is no boardroom visibility".*

2.11 All agreed that these were likely to hinder progress in changes to service provision, collaborative commissioning and improvements in getting value for money from public resources which are required from the public sector in Wales.

**Design of the programme**

2.12 In 2010, Value Wales submitted a proposal to WEFO for ESF funding for the HGT programme to increase the capacity, capability and recognition of procurement specialists. HGT is an £11 million programme of training and targeted funding which sits within the Convergence Area's ESF programme's Priority 4. Priority 4 aims: "To improve the effectiveness and efficiency of public services in the region" and has two themes which are to:

- Transform public services through more effective collaborative working: this theme aims to redesign public services to make them more efficient, effective and responsive to the communities they serve. Supporting

collaborative procurement is a central part of this theme, including encouraging electronic procurement solutions as is implementing sustainable procurement practices.

- Build the capacity of public service sectors to deliver higher quality services: this theme aims to develop the skills and capacity of the public service workforce. This includes addressing skill gaps, developing the skills of leaders and managers, and strengthening the capacity of social partners[14].

2.13 The revised Business Plan for the HGT programme outlines that it aims to support the work of the Welsh Government's Public Service Leadership Group and the Procurement Board as well as to address the issues raised since the beginning of the programme in the McClelland report about skill gaps and shortages and the profile of public procurement specialists[15].

2.14 The programme has five strands:

a. **Raise awareness with public service leaders**: this will begin in 2013, and will involve the delivery of workshops, conferences and meetings with senior public service leaders focused on raising their awareness of the role and significance of procurement professionals (and linking this with particular political / policy goals they may have, such as collaboration and shared services). Four Welsh universities will be involved in developing this: Glamorgan, Bangor, Swansea and Cardiff.

b. **Develop the skills and capability of existing public service staff**: this Strand has funded a range of short courses focused on particular issues of relevance to existing procurement professionals (for example, the impact of revised European Regulations) since late 2010.

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[14] Welsh Assembly Government (2009), *European Structural Funds 2007-2013 Strategic Framework: Modernising and Improving the Quality of our Public Services (Making the Connections)*, p. 4 - 5

[15] Value Wales (2012), *Project Business Plan: Transforming Procurement through Home Grown Talent (v 5)*

c.   **Deliver a Trainee Procurement Executive Programme (TPEP)**: this has provided a three year development programme for up to 24 trainees which includes a maximum of three secondments for the trainees in Welsh public sector organisations (who set out a business case and project for the trainees to complete while on secondment) since summer 2011.  During the programme, trainees complete a set of complementary training courses: Prince 2 at practitioner and foundation levels, the Institute of Learning and Management (ILM) accreditation from level 3 to 5, and the CIPS Professional Studies levels 4 (Foundation Diploma), 5 (Advanced Diploma) and 6 (Graduate Diploma).

d.   **Accelerate and expand the implementation of e-procurement:** this strand makes funds available to Welsh public sector organisations to develop their e-procurement capabilities.  Eligible organisations submit proposals to Value Wales for funding to pay for project management and other expertise to enable the implementation of standard e-procurement tools.

e.   **Identify innovative approaches to improve procurement**: this strand will begin in 2014.  It will pilot new approaches to improve procurement (for example, collaboration with the third sector).  Four Welsh universities will be involved in developing these approaches: Glamorgan, Bangor, Swansea and, Cardiff. This will also be linked to the new Welsh Government innovation strategy which includes a section on public sector procurement.

2.15  Table 1Table 1: HGT programme targets details the current ESF targets for this programme and the achievements to date.

**Table 1: HGT programme targets**

| ESF Priority 4 Indicators | Targets for HGT programme | Progress to date |
|---|---|---|
| **Outputs** | | |
| Total participants (employed)[16] | 1,396 | 328 |

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[16] This deliverable relates to the number of different staff who have received training and attended workshops and meetings.

| | | |
|---|---|---|
| Female participants – Strand 2 | 52% | 57% |
| Key intervention group (Strand 2): <br> *Public service managers* <br> *Public service workforce* | <br> *50%* <br> *50%* | *Unknown* |
| Dissemination initiatives[17] | 20 | 4 |
| Employers assisted or financially supported (through the Strand 3 placements)[18] | 68 | 75 |
| Projects delivering specialist training in sustainable development (this programme as a whole) | 1 | 0 |
| **Results** | | |
| Collaborative agreements between public service bodies[19] | 10 | 0 |
| Sub-regional workforce planning & development strategies(this programme as a whole) | 1 | 0 |
| Organisational learning and development strategies (this programme as a whole) | 15 | 0 |
| Participants completing courses - Employed[20] <br> Key intervention groups: <br> *Public service managers* <br> *Public service workforce* <br> *Female participants* | 1,047 <br> <br> 50% <br> 50% <br> 52% | 743 |
| Secondment placements | 72 | 29 |

2.16 It shows that the programme has achieved the number of employers to be assisted or supported and is on track to achieve the number of participants completing courses. Secondment placements are a little behind schedule but should be on track with a further cohort of trainees later this year. Total participants are much lower than expected. This may reflect the difficulties reported by the programme team in capturing some eligible participants in the Strand 2 meetings to improve collaborative purchasing. It may also be because many more non-specialist procurement staff have yet to participate in Strand 2 training. Dissemination activities should increase once Strand 1 starts.

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[17] This includes the 'Open for Business' events which Value Wales are running, and the meetings of the 'Corporate Procurement Steering Group' which includes the Heads of Procurement from all Welsh public sector organisations.

[18] This is the number of employers that have benefited from the HGT programme (all strands).

[19] Some of the projects being delivered by Strand 3 trainees aim to develop collaborative agreements between public sector organisations (usually, a framework contract).

[20] WEFO has agreed that this deliverable relates to the overall number of training courses, workshops and meetings undertaken.

**Related initiatives**

2.17 Value Wales has delivered related and complementary initiatives over the past few years. These are:

- Developing, delivering and funding training: Value Wales's policy team has developed a set of short course training courses designed for delivery to the Welsh public sector procurement workforce and covering Welsh-specific topics including EU Procurement Directives, the Supplier Qualification Information Database (SQuID), and Community Benefits. These courses are available to the public procurement workforce free of charge. Value Wales also provides a 42% subsidy to around 20 public sector procurement staff a year to undertake CIPS professional qualifications. Value Wales has also held a contract with a specialist training provider – PMMS – to deliver a programme of short courses in general procurement skills, such as negotiation and supply chain management. This training provider has been in place since 2003 and delivers these courses to Welsh public sector organisations in response to their skills needs. This contract is currently being re-tendered. The training courses are available in Strand 2.

- Developing a competency framework for the profession: over the past year Value Wales has been working with the University of Glamorgan to develop a competency framework for the procurement profession. This builds on the Government Procurement Service framework with the addition of competences to address concerns in key strategic reports[21] and a greater focus on particular skills required for working in the Welsh public sector. This competency framework has informed the tendering process for Value Wales's new external training requirements (which is currently held by PMMS).

- Designing and undertaking a 'fitness check' of all Welsh public sector organisations: this two year project, which is currently at tendering stage,

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[21] Including McClelland, J (2012), *Maximising the impact of Welsh procurement policy* and Welsh Government (2009), *Barriers to Procurement Opportunity Research*

aims to undertake 'fitness checks' of the procurement practices within every Welsh public sector organisation (starting with local authorities and NHS Health Boards as the largest spenders). The fitness checks will be based on a capability model which has been developed by Value Wales. This model sets out where each public sector organisation should be in relation to eight areas of performance. These are: procurement leadership and governance; procurement strategy and objectives; defining the supply need; commodity / project strategies and collaborative procurement; contract and supplier management; key purchasing processes and systems; people; and performance management.

**Key summary points**

2.18 It is clear that:

- Improving procurement is a key issue for public services in Wales and underpins progress towards greater collaboration and shared services as well as increasing value for money and providing efficiencies and economies;

- It is recognised that skill gaps and shortages exist in procurement within the public sector as a whole but particularly local authorities which reduce the capacity to respond to these challenges;

- The HGT programme is expected to address some of these challenges in its five project strands alongside the continuing work led by Value Wales and by existing collaborations and consortiums; and

- The programme is broadly on target to achieve most of the ESF targets which have been set as a condition of ESF funding towards the programme. Some action is needed to involve more specialist and non-specialist procurement staff in Strand 2 training.

## 3 Strand 2: Training courses and meetings

3.1 This chapter outlines the findings about Strand 2 of this programme. First, based on programme MI, it presents analysis of the beneficiaries and the training and workshop opportunities which have been undertaken as part of this activity (the latter is significantly higher because of people taking up multiple training opportunities); second, it presents findings from a survey sent to all Strand 2 beneficiaries on the delivery of the training and how it could be improved, why people took part, and any impact the training has had on their skills and knowledge and what impact this has had in the workplace.

**Development and management of the training and workshops**

3.2 A mixture of training courses, workshops and meetings has been provided within Strand 2. Staff in all public sector organisations in the Convergence area along with organisations based outside this area that undertake work which benefits the Convergence area are eligible to participate. There are three types of training opportunity which have been offered under Strand 2.

- A programme of short courses[22] delivered by PMMS. This training organisation has held a contract with Value Wales to offer training opportunities to Welsh public sector organisations since 2003. These courses aim to equip public sector staff with key skills of relevance for their role in procurement. These courses cost between £1,200 and £1,500 and are delivered in the workplace or at a venue nearby. Under Strand 2, the public sector organisation has to pay £50 per learner (eight learners is considered to be a minimum for the course to be delivered)

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[22] The following courses are part of this programme: Commercial Awareness; Transfer of Undertakings (Protection of Employment) 2006 regulations; Conducting a Competitive Dialogue; Contract Management (offered over 1 or 2 days); EU Procurement Directives – Introduction to the 2004 Public Sector Directive and EU Compliant Supplier Selection & Contract Award; Exploring Terms & Conditions; Frameworks & Mini Competitions; Introduction to Procurement Course; Supply Chain Management (1 day); Procurement Policy; Specification Writing; Evaluation; Construction training, NHS Differences training; Introduction to Negotiation.

and the HGT programme pays the remainder.  The public sector organisation has to pay for the travel of staff if an external venue is used;

- A programme of courses[23] developed by Value Wales' policy team which focus on topics of particular relevance to the Welsh public sector procurement workforce.  These were developed by Value Wales in response to perceived gaps in this area.  The Value Wales courses were offered free of charge to public sector organisations before the HGT programme and continue to be free. These are delivered by Value Wales;

- Any meetings involving public sector procurement staff at which collaborative procurement (which would be of benefit to the Convergence area) was discussed.  In practice, it has been challenging to provide evidence of the validity of these meetings in organisations other than Value Wales.  In total, 40 different types of meetings have been claimed for.  Programme managers report that these meetings are about awareness raising and educating staff about key upcoming policy priorities and, as such, are in line with the wider goals of the programme.

3.3 The programme advertised these training opportunities using the *"usual routes"* of the weekly bulletin which is circulated around Welsh public sector staff and the sell2wales website.  Heads of Procurement at all Welsh public sector organisations were also contacted by Value Wales and asked to suggest staff members that might be suitable for this training; it is not clear whether they undertook a formal process of assessing the skill needs of their staff.  The programme originally intended to offer only the PMMS short course programme however at an early stage, it became clear that the PMMS short course programme was not being taken up to the expected level. This is thought to be because most public sector

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[23] A total of 24 Value Wales-designed short courses were delivered under Strand 2 covering the following topics: Community benefits; Supplier Qualification Information Database; training in other Welsh government specific e-procurement tools; public procurement and Welsh language.

**Courses and attendance**

3.4 A complete listing of the courses, workshops and meetings can be found in Annex 2 with the number of eligible attendees at each. The tabulation in Annex 2 shows that:

- a varied range of training courses were available which cover the expected range of knowledge and skills needed, with some focusing more on knowledge than skills and vice versa; and

- the meetings and workshops cover working/project groups, forums, discussion groups, user groups and one to ones. It is not possible to discern from the titles to what extent these would each provide relevant knowledge and skills or contribute to collaborative procurement.

3.5 The 328 beneficiaries have attended a total of 743 training courses, workshops and meetings. Therefore, on average each beneficiary has attended 2.3 eligible training events. The McClelland report estimated a total of 419 FTE procurement staff across the whole of Wales (i.e. including those organisations outside the Convergence area)[24]. On the basis of the roles reported by attendees (see 3.3.7 below) around a third have participated. Those in non-specialist procurement roles who have attended (160) are a very small proportion of such staff in the public sector who have responsibilities for commissioning works and services.

*Training courses:*

3.6 There have been 18 courses delivered by PMMS (from their short course programme) and 24 courses delivered by Value Wales staff. These courses have had 403 attendees. The course most frequently taken up is on the EU Procurement Directive which has had 59 participants followed by the Supplier Qualification Information Database (SQuID) training course which has had 34 in total.

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[24] McClelland, J (2012), *Maximising the impact of Welsh procurement policy*, p. 28

***Meetings including workshops and groups:***

3.7   There have been 39 different meetings involving 340 attendees which have been claimed for under Strand 2.  The most frequently attended have been an Open for Business Event with 56 participants and the 'Efficiency and Innovation Board - Savings Workshop' which has had 45.

**Beneficiary characteristics**

3.8   This section presents analysis of the programme database which has details of the 328 beneficiaries of Strand 2[25].

*Gender*

3.9   There were more female beneficiaries of the programme than male – women accounted for 57% of beneficiaries.  However, females make up a larger proportion of the public sector workforce in Wales (63%) than males[26]; so this might not be unexpected.

**Figure 1: Gender of beneficiaries**
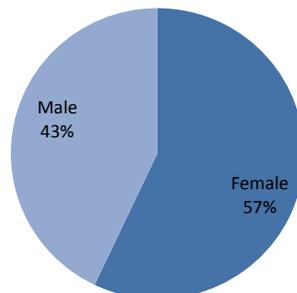


*Age*

3.10  Beneficiaries ranged in age from 18 to 62. Around 15% of the beneficiaries were aged under 30 and so in the early phase of their careers. Over half (56%) of beneficiaries were in mid career (aged 30 – 49) while nearly one-third (28%) were in their later career (over 50 years old).

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[25] This data is taken from the programme database on 2 April 2013.
[26] From Annual Population Survey 2012, percentage of all workers employed in public sector
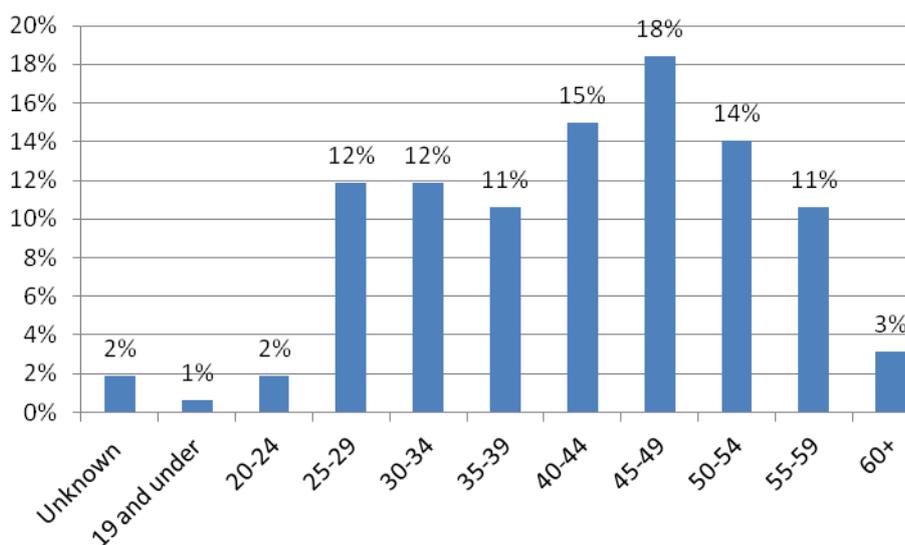
## Ethnicity

3.11 Nearly two-thirds of beneficiaries (63%) identified themselves as Welsh. The second largest group was British (31%). Very few described themselves as Black or Minority Ethnic.

**Figure 3: Ethnicity of beneficiaries**
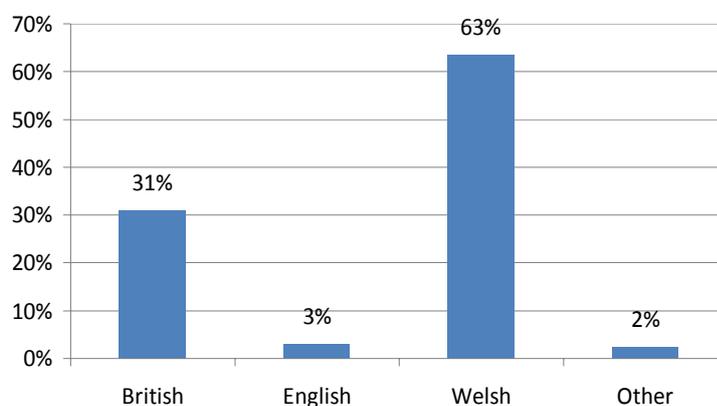


## Welsh language proficiency

3.12 The majority of beneficiaries could not understand, speak, read or write Welsh. Of those who had some knowledge of Welsh, 33% could understand it, whilst slightly fewer (28%) could speak and/or read it. Around one quarter could write Welsh. In the 2011 census 19% of the

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[27] As of 31 December 2012.

population in Wales spoke Welsh (there is no published data on writing and reading).

**Figure 4: Welsh language proficiency of beneficiaries**
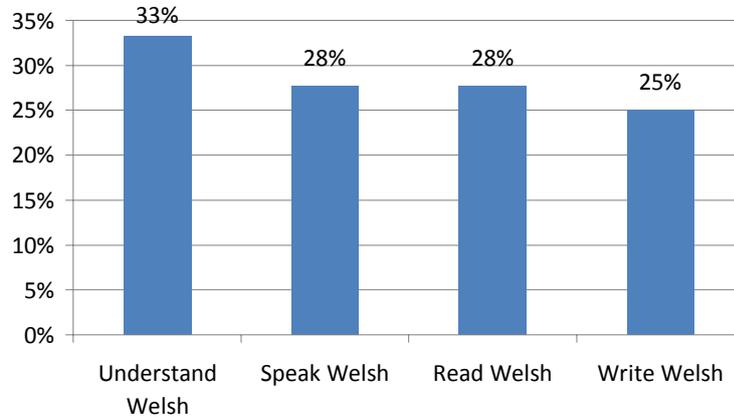


## *Location*

3.13 Beneficiaries of the training came from every local authority area in Wales, including those not in the Convergence area (indicated in pale blue). Rhondda Cynon Taff and Ceredigion supplied the highest number of participants, accounting for nearly a quarter of all beneficiaries. Seven local authority areas (Blaenau Gwent, Isle of Anglesey, Neath Port Talbot, Powys, Monmouthshire, Flintshire and Wrexham) provided five or fewer beneficiaries. There was one beneficiary from outside Wales.

**Figure 5: Number of beneficiaries in local authority areas in Wales[28]**
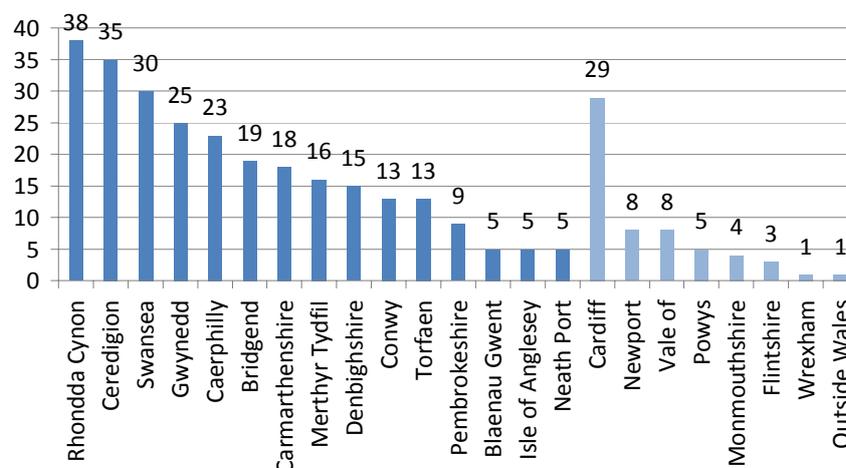


3.14 Figure 5 shows an analysis of the location of beneficiaries of training compared to the distribution of staff employed in the public sector in each local authority area. There are some local authorities with much higher than expected numbers of beneficiaries (Ceredigion, and Gwynedd for example) and a few with a lower than expected number of beneficiaries (although the differences here were smaller and these were mainly the non-Convergence area).

**Table 2: Beneficiaries in local authority areas**

| Local Authority | No. of beneficiaries | % total beneficiaries | % of total public sector workforce[29] | Percentage points difference |
|---|---|---|---|---|
| *Convergence area local authority areas* | | | | |
| Rhondda Cynon Taff | 38 | 12% | 8% | 4% |
| Ceredigion | 35 | 11% | 3% | 8% |
| Swansea | 30 | 9% | 8% | 1% |
| Gwynedd | 25 | 8% | 4% | 4% |
| Caerphilly | 23 | 7% | 5% | 2% |
| Bridgend | 19 | 6% | 4% | 1% |
| Carmarthenshire | 18 | 5% | 7% | -1% |
| Merthyr Tydfil | 16 | 5% | 2% | 3% |

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[28] Non-convergence areas highlighted in pale blue
[29] From Annual Population Survey 2012, percentage of all workers employed in public sector in Wales in each local authority area

| Local Authority | No. of beneficiaries | % total beneficiaries | % of total public sector workforce[29] | Percentage points difference |
|---|---|---|---|---|
| Denbighshire | 15 | 5% | 4% | 1% |
| Conwy | 13 | 4% | 4% | - |
| Torfaen | 13 | 4% | 4% | - |
| Pembrokeshire | 9 | 3% | 3% | -1% |
| Blaenau Gwent | 5 | 2% | 2% | -1% |
| Isle of Anglesey | 5 | 2% | 2% | -1% |
| Neath Port Talbot | 5 | 2% | 4% | -2% |
| *Non-Convergence area local authority areas* | | | | |
| Cardiff | 29 | 9% | 13% | -4% |
| Newport | 8 | 2% | 5% | -2% |
| Vale of Glamorgan | 8 | 2% | 3% | -1% |
| Powys | 5 | 2% | 4% | -3% |
| Monmouthshire | 4 | 1% | 3% | -2% |
| Flintshire | 3 | 1% | 4% | -3% |
| Wrexham | 1 | 0% | 4% | -4% |
| Outside Wales | 1 | 0% | | |
| **Totals** | **328** | **100%** | **100%** | - |

### *Existing qualification level*

3.15 Just over half (53%) of beneficiaries held a qualification at NQF levels 4-6, with nearly one-third (30%) qualified to NQF Level 7 or 8. Very few beneficiaries had qualifications at NQF Level 3 (8%), Level 2 (6%), or below Level 2 (3%).

3.16 Female beneficiaries were more likely than males to have an NQF Level at 3 or below (20% compared to 12%), with men more likely to hold a qualification above NQF Level 7 (34% compared to 26%). Six beneficiaries did not state their highest level of qualification held.

**Figure 6: Highest qualification level of beneficiaries, prior to the intervention**
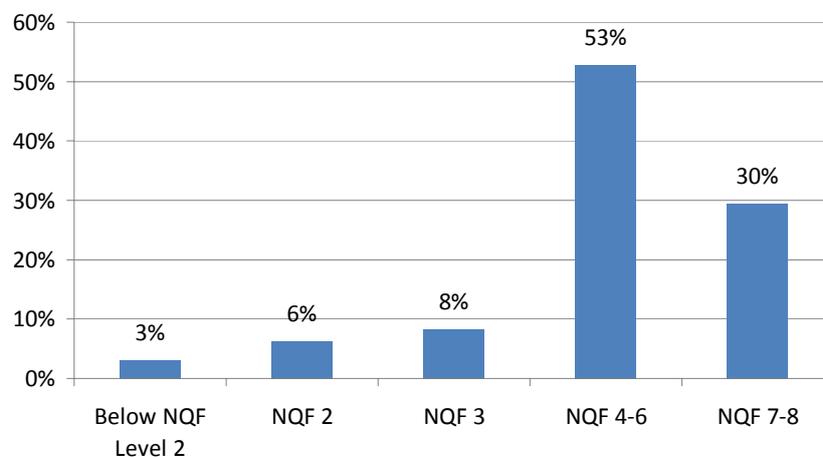


*Job role*

3.17 Just over two-fifths (43%) of beneficiaries were employed in a job role with a specialist procurement function[30]. These specialists ranged in their levels of seniority from assistants, to managers and heads of procurement. However, any analysis of role differences was not possible because job titles could not be used to determine role.

3.18 Those not employed specifically in procurement had a diverse range of roles – including engineers, accountants, logistics managers and lecturers – which would be expected given the wide range of public sector staff with commissioning and procurement responsibilities for the services they manage. These accounted for about 40% of beneficiaries. 56 beneficiaries (18% of the total) did not state their job role.

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[30] Beneficiaries were identified as having a specialist procurement function if their job title contained any of the following words: procurement, buyer, contract, purchaser, commissioning

**Figure 7: Job role of beneficiaries**
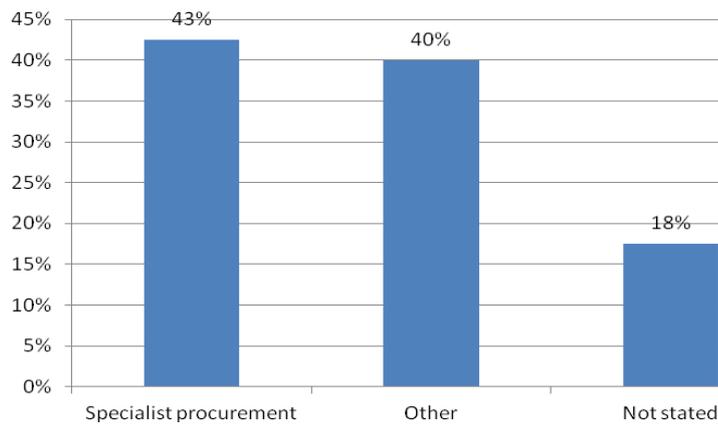


**Characteristics of employers**

3.19 Beneficiaries were principally employed by local authorities; the Welsh Government or Government Agencies; and the NHS. So far, 75 organisations have had employees go on training, workshops or meetings funded under Strand 2. Significant minorities were employed by universities, FE colleges and other public services (such as the police and fire services). Other organisations included voluntary organisations. Over two-fifths (43%) of beneficiaries were employed by local authorities. This is set out in Figure 8 below.

**Figure 8: Beneficiaries by sector**
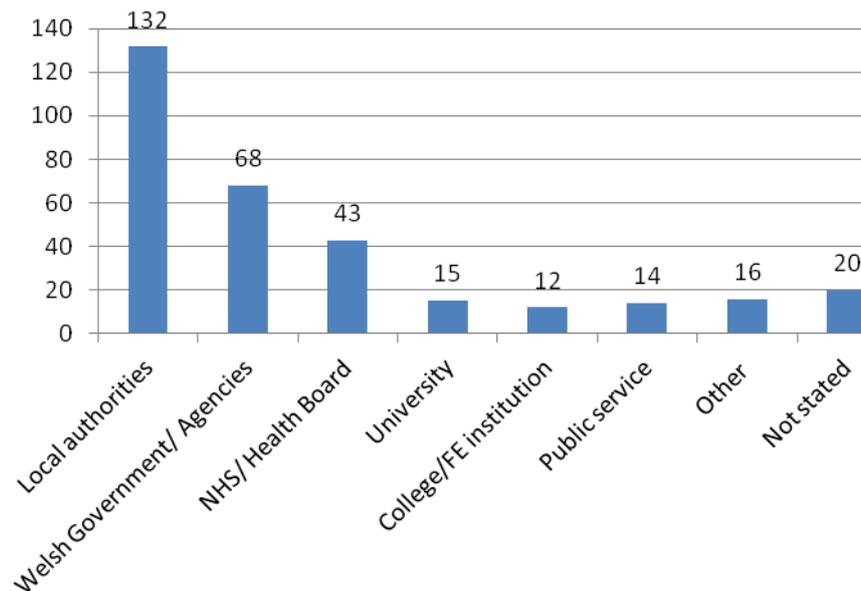


3.20 In total, all 22 local authorities sent employees on the training, with the majority sending more than one although this varied significantly.

Ceredigion (17) and Rhondda Cynon Taf (11) sent the largest numbers. The second highest sector represented was the Welsh Government and agencies with 45 beneficiaries coming from the Welsh Government, with a further 23 from other government agencies (for example, the Forestry Commission and Estyn). Together, these accounted for 21% of all beneficiaries. The third largest sector was the NHS/ Health Boards (with 43 beneficiaries). Twenty respondents did not state the organisation that they worked for.

**Beneficiaries' views of the training**

*Why beneficiaries decided to join the programme*

3.21 Just under three-fifths (58%) of beneficiaries decided themselves to attend the course; nearly one-third (29%) went on the recommendation of their line manager, and 4% on the recommendation of someone else. 9% of beneficiaries did not answer the question (Figure 9).

3.22 Of the 90 beneficiaries who decided for themselves to attend the course, around two-thirds (62%) stated that one of their reasons for attending was "an interest in the subject". Two-fifths (41%) also attended to "address a skills gap" (Figure 10).

**Figure 9: Who made the decision for the beneficiary to attend the course**
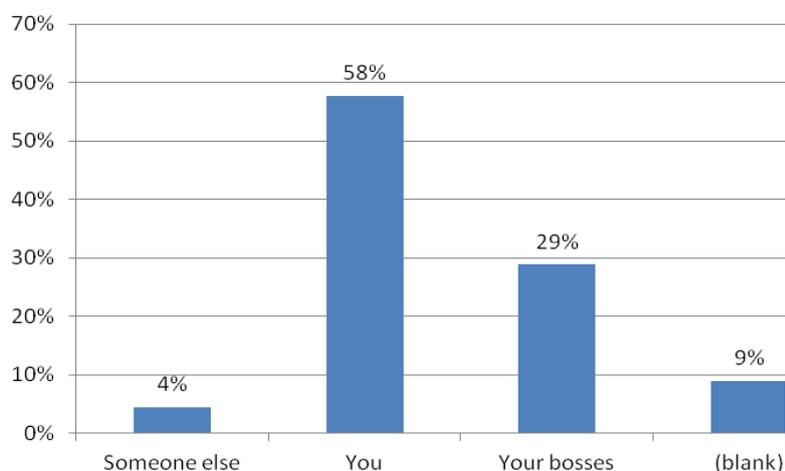
**Figure 10: Why did the beneficiary decide to do the course**
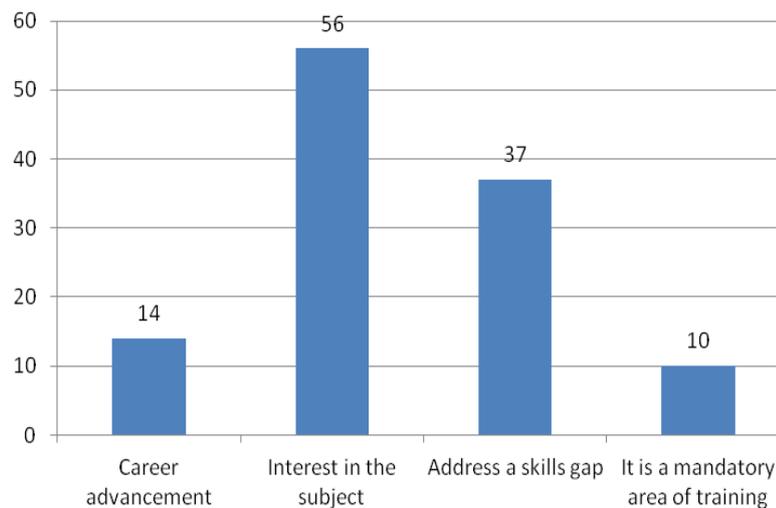


*n=117*

### *Delivery of training*

3.23 Beneficiaries were generally positive about the delivery of the training, with all measures tested in the survey reporting levels of agreement or strong agreement of over 70%.

- Ratings of the quality of equipment available at the training location were very high, with over three-quarters (78%) agreeing or strongly agreeing that *'the equipment was of sufficient and high quality'*; and only 4% disagreeing or disagreeing strongly (Figure 11);

- The quality of both trainers and resources was rated very highly. Over four-fifths (86%) agreed or strongly agreed that the training was *'carried out by high quality tutors/ trainers'*; while three-quarters (75%) agreed or strongly agreed that the *'quality of learning resources'* was high (Figure 11);

- Beneficiaries faced very few problems in fitting the training around their professional commitments. Nearly four-fifths (78%) of beneficiaries agreed or strongly agreed that the service was *'flexible enough to fit with my professional commitments'*. Only 2% disagreed or strongly disagreed with this statement (**Error! Reference source not found.**Figure 11).

- Nearly three-quarters (73%) were happy with the location (of whom nearly a fifth 'strongly agreed' that the location was convenient). 10% did not find it convenient.

- Only around 5% of beneficiaries reported that the training was too long or too short. The majority had no opinion on the length of the training (around three-fifths neither agreed nor disagreed that the training was too long or too short).

**Figure 11: Beneficiaries' perspectives on the delivery of training[31]**
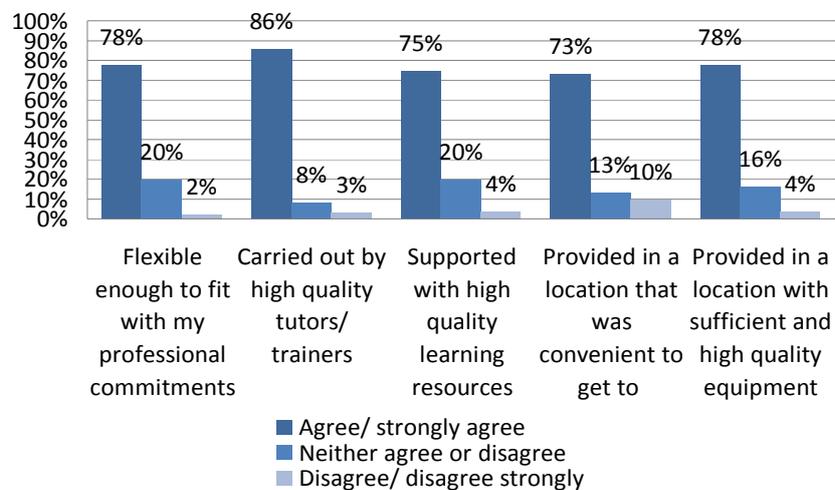
**Relevance of the training**

3.24 Beneficiaries generally felt that the training they attended was relevant to them, with around four-fifths agreeing or strongly agreeing that it was relevant to their current role (79%), future plans (81%) and/or work of their organisation (86%). Only about 5% disagreed with these statements

**Figure 12: Beneficiaries' perspectives on the relevance of training[32]**
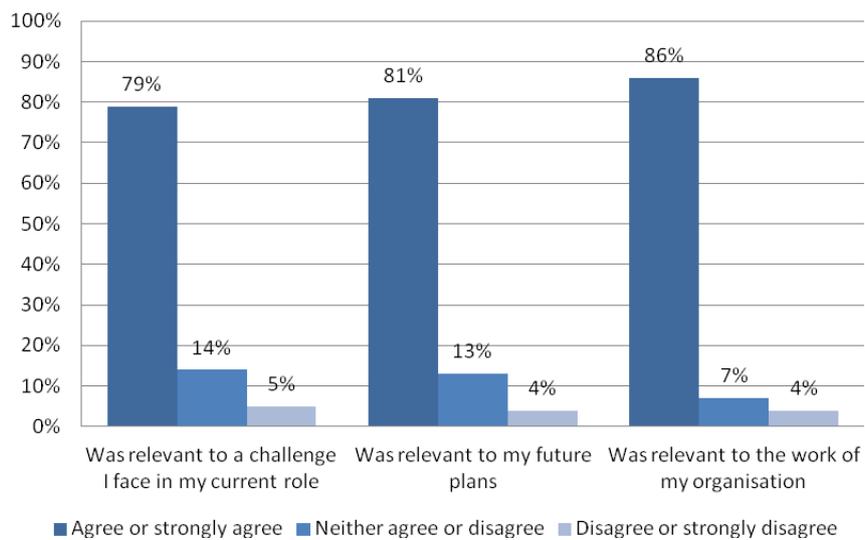


3.25 Responses to whether the training addressed a particular skill, competency or knowledge need were less clear. About two-thirds (67%) agreed or strongly agreed that the training addressed an area of knowledge they lacked, but 11% disagreed, or disagreed strongly. Similarly, 10% also disagreed or disagreed strongly that the training addressed a skill or competency that they lacked (Figure 13).

**Figure 13: Beneficiaries' perspectives on the areas of need the training addressed**
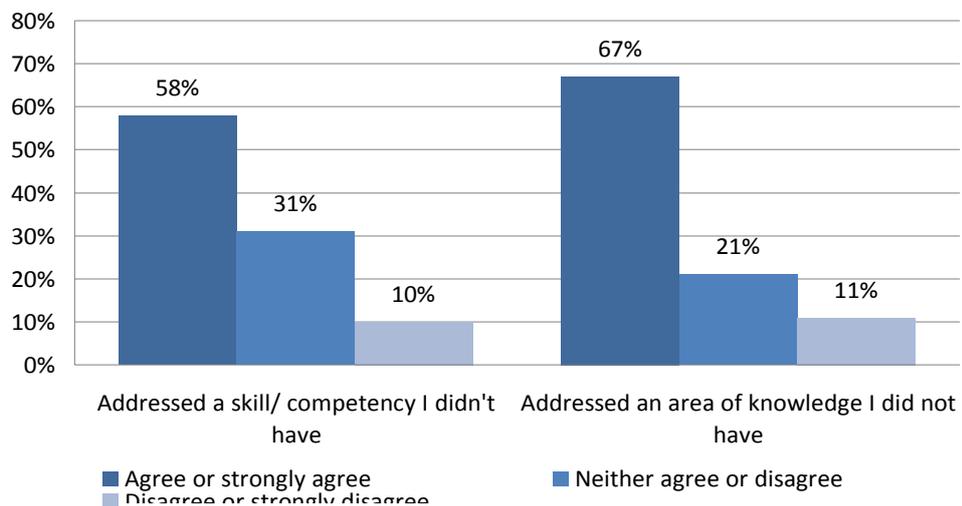


*Suggestions for how to improve the training*

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[32] Percentages quoted here exclude respondents that did not answer.

3.26 Fifty of the respondents provided suggestions as to how the training could be improved. Around one-third of these respondents commented on the content of the course, and about one-fifth on its relevance, location or Welsh language provision. The remainder covered a variety of topics.

3.27 Suggestions for improving the content and delivery of the course included:

- Giving the content a greater Welsh policy slant – *"Tailor short courses to the Welsh context"*;

- Including more in-depth or specific information – "*More time on the subject matters*";

- Explaining the information more clearly, perhaps through the use of on-line tools – "*The information was very complex and was still in a paper format… it would have been easier to talk through an on-line tool*".

3.28 Comments on the relevance of the course generally arose because the beneficiary worked in a field which was not directly relevant to the training; one beneficiary suggested, *"Checking the relevance of the subject matter before with a prospective attendee"*.

3.29 Beneficiaries also mentioned that training was mostly based in South Wales, which *"meant a lot of travelling"* for those based in North or West Wales. Three beneficiaries felt that the Welsh provision – particularly of electronic resources – could be improved; though one felt that the delivery of the session in Welsh was unnecessary as the language of choice of all delegates was English.

**Outcomes on learners, trainees and participant organisations**

*Impact of training on knowledge, confidence and productivity*

3.30 Figure 14 shows that the biggest area of impact of the training is in beneficiaries' knowledge or skill in the area of the training (84% felt

that this had been improved). Smaller proportions of respondents thought that their confidence (53%) and productivity (38%) in the workplace had been improved.

**Figure 14: Impact of the training on beneficiaries' knowledge, confidence and productivity**[33]
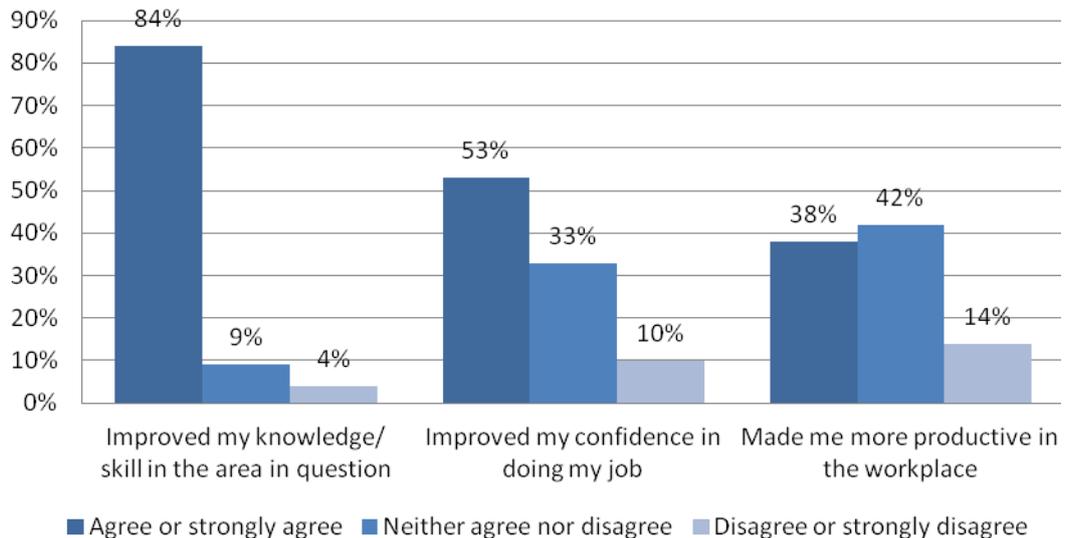


3.31 Survey respondents were also asked to describe what their main areas of learning had been. Drawing out themes from their answers was difficult as almost all respondents highlighted learning knowledge, techniques or good practice that was specific to the courses they attended:

"*Awareness of the SQUID database*"

"*Information on changes to the EU Directive*"

"*Understanding the coaching and mentoring role and the importance of encouraging the participant to suggest solutions*"

3.32 Most of these comments focused on SQUID, reflecting the fact that courses dealing with this had the largest number of participants. A few beneficiaries highlighted more general learning, or increases in confidence, often because they were new to procurement:

"*New to procurement, so all areas*"

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[33] Percentages quoted here exclude respondents that did not answer.

*"Increased my confidence and knowledge when giving expert advice to officers and when I design tenders"*

### Impact of training on beneficiaries' actions in the workplace

3.33 The survey asked about the impact of training on: procurement practices within their organisations, management procedures, contracting procedures, support of non-procurement colleagues, and whether there had been an expanded role for procurement specialists. Figure 15 shows that for each of these questions, high proportions of beneficiaries answered that the training had no impact on their actions in the workplace (between 41% and 63% answered that the training had no impact). The areas where most impact was seen in the workplace were in improved procurement practices and improved support of non-procurement colleagues.

**Figure 15: Impact of the training on beneficiaries' actions in the workplace[34]**
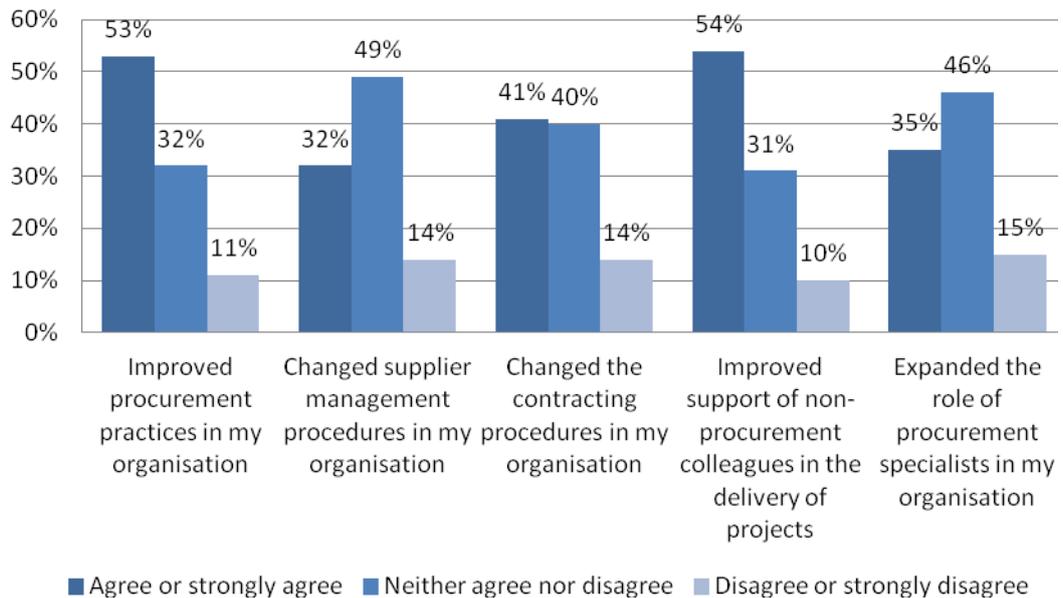


3.34 Survey respondents were also asked to describe what they thought the impact of the training had been on their actions in the workplace. Fifty respondents answered this question. Around one-third mentioned changing procedures or developing/ refining new tools as a result of the training. The kinds of changes to procedures or tools

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[34] Percentages quoted here exclude respondents that did not answer.

varied considerably – this is unsurprising given the differing content of the various training courses attended:

*"Developed several fit-for-purpose Pre Qualification Questionnaires"*

*"Introduced community benefits as non-core into our tenders and contracts"*

*"Changes to the way we set up procurement of services"*

3.35 Roughly 10% of beneficiaries mentioned that they had shared the learning from the training with colleagues:

*"Briefing note to all procurement colleagues on actions to be taken to comply with Welsh Language Agenda"*

*"I have informed colleagues of the benefits and value of the training"*

3.36 Roughly 10% of beneficiaries had not yet, or did not intend to, take any action as a result of the training:

*"None as yet, waiting for an opportunity to put into practice"*

*"As previously stated, my role within procurement is very limited. I would take guidance from the procurement team within the authority if the need arose"*

**Key summary points**

3.37 We have found that:

- PMMS provided a range of training courses selected by Value Wales while Value Wales provided others themselves. Some interviewees have indicated that their availability is not well known and may not reflect the needs of different groups of staff who the programme is aimed at;

- A varied range of training courses were available which cover the expected range of knowledge and skills needed by both specialist and non-specialist staff engaged in public sector procurement;

- So far, 328 different public sector staff have been on over 42 different training courses and 39 different workshops/meetings; with over 743

attendances recorded many have attended more than one course or meeting;

- Over half the beneficiaries are female (57%), most are in mid-career (56%, and relatively more than the general population could speak Welsh (28%);

- While the Convergence area accounts for most of the beneficiaries (81%) these are not evenly spread or representative of the spread of the public sector workforce. Some local authority areas account for many more than others; this is partly because of the local authorities themselves taking places and the location of Welsh Government offices and agencies but must be partly because of differential levels of take up by eligible organisations which cannot be explained;

- Local authorities account for more attendees (43%) than the NHS (14%), and other services (14%). The Welsh Government and agencies accounted for 22%;

- Most beneficiaries are well-qualified with prior qualifications at level 4 and above (83%) and are split roughly equally between specialist staff (43%) and non-specialists (41%) which indicates a broad appeal;

- Most attendees chose the course themselves and most of them did so because of "interest in the subject". Only 41% attended a course it because it filled a skill gap;

- In all respects, participants were mainly satisfied with the delivery of the training/workshop. Generally there were fewer than 10% who were not. Some made a few suggestions for improvement about delivery including time, information and location;

- Most were also positive about the relevance of the training or workshop to their job, role and organisation (80% or more), although smaller proportions, albeit the majority, felt that it addressed a skill or capability they lacked (58%);

- Nearly all attendees improved the knowledge and skills in the area covered by the training or workshop they took part in (84%) though fewer (38%) believed that the training or workshop has made them more productive i.e. improved their competence. This might be expected for relatively short courses; and

- With regard to impact, a majority only reported that the training/workshop had improved procurement practices (53%) and the support given to non-specialists (54%); only around a third believed that the training/workshop had influenced supplier management processes (32%), for example, and contracting procedures (41%).

# 4   Strand 3: Trainee Procurement Executive Programme

4.1   This chapter outlines findings in relation to Strand 3.  It outlines the reasons why trainees applied to the programme and their views on the application process; details of the training and secondments undertaken and the support they have received in undertaking these activities; and analysis of the outcomes achieved to date.  It is based on interviews with the trainees, line managers and mentors, and analysis of programme MI.

**Organisation and Management of Trainee Procurement Executive Programme (TPEP)**

4.2   This entirely new programme of activity seeks to develop the skills of new entrants to the procurement profession through a programme of training and secondments in Welsh public sector organisations. Places on the programme were openly advertised in 2011 and then through a selection process involving interviews and an assessment day a cohort of trainees was selected. These trainees are officially employed on Welsh Government contracts for the duration of the programme.  A second cohort was recruited in 2012 through advertisement of the programme to existing Welsh public sector workers.

4.3   Value Wales advertised the programme to Welsh public sector organisations who were asked to submit bids to the programme to host the trainees on a year-long secondment. The bids had to include detail of a project that trainees would be responsible for of benefit to the organisation. The host organisation must:

- Support or facilitate a collaborative procurement project involving two or more public service organisations realising measurable benefits;

- Be based in the Convergence area, or have benefits linked to the Convergence area;

- Design a project with aims which support the principles of the Wales Procurement Policy statement;

- Deliver a collaborative procurement project which meets key Welsh Government policies on the use of SQuID, xchangewales tools and community benefits policy;

- Provide the trainee with a set of objectives at the beginning of the secondment, and provide regular progress reports to the programme team;

- Be committed to developing the trainee's skills, and confirm that this commitment is in place for the duration of the secondment; and

- Sign a Memorandum of Understanding committing to the development of the individual while participating in the project.

4.4 The expression of interest that bidding organisations submit needs to include: a summary of the project and how it benefits the Convergence area; an outline of the benefits that the project will bring, including those that would not have been achieved without the trainee; detail on the trainee's role, and the SMART objectives they would be expected to achieve; and the existing knowledge/skills the trainees would require and what they would learn.

4.5 Decisions on which projects to award a trainee are taken by the Programme Board which consider: the alignment of the project with Welsh Government policy; the potential benefits of the collaborative procurement project and scope for transferability of benefits; the location of projects and the location of trainees; and the development needs of trainees and how these might be met by the secondment.

4.6 Once on secondment, line managers for the trainee are responsible for ensuring the quality of the placement. They set objectives for the trainee and these are agreed with the programme manager. Trainees are supported by the Professional Development Manager in Value

Wales. He provides support to all trainees through quarterly meetings to assess progress and to address any problems with secondments (as well as being available to deal with queries in between). He reviews the trainees' objectives for each secondment and monitors progress towards these in the quarterly meetings, as well as keeping in contact with the trainees' line managers and deciding on where to move them for further experience.

4.7 Trainees are also allocated a personal mentor who is a senior procurement professional and is usually from a different organisation to where the trainee is on placement. Mentors and trainees are supposed to meet quarterly to catch up and discuss progress.

4.8 The Strand 3 manager keeps a record of the type of activity that each trainee undertakes while on their secondment. There are four categories of activity (e-procurement, policy support, supply chain, and tender or contract management) and the programme makes efforts to ensure that across their secondments, trainees undertake a mixture of types of project. The manager also keeps a record of which part of the public sector the trainees have been seconded to with a view to ensuring that they get a breadth of experience. There is no indication from interviewees that there was a regional allocation of trainees in each year but bids were considered on their merits.

**Strand 3 beneficiaries**

4.9 Twenty-two trainees have been recruited onto Strand 3 of the HGT programme in two cohorts, the first in summer 2011, and the second in summer 2012. The first cohort was largely recent graduates while the second cohort was recruited from Welsh public sector organisations. Four of these trainees have left and one has been replaced. The trainees that have left have all entered full time jobs in Welsh public sector organisations undertaking procurement activities. A further round of recruitment onto the programme is due to take

place in summer 2013, which will take the programme up to its target of 24 trainees. The 22 trainees are evenly split by gender.

4.10 Trainees have so far worked in 18 different public sector organisations. Two non-national organisations outside the Convergence area (Cardiff Council and NHS Vale of Glamorgan) had to demonstrate what benefit they would bring to organisations within the Convergence area.

4.11 0 shows that in the first round of secondments more than half of the trainees were placed in local authorities. In the second round of secondments, there was a more even spread with trainees undertaking placements in all types of organisation covered. Overall, around two-thirds of all placements have been either in the NHS or in a local authority.

**Table 3: Type of organisations in which trainees were seconded**

|  | Secondments in 2011/12[35] (n=9) | Secondments in 2012/13[36] (n=20) | Total (n=29) |
|---|---|---|---|
| **NHS** | 3 | 4 | 7 |
| **Local authority** | 5 | 6 | 11 |
| **Welsh government department / agency** | 1 | 5 | 6 |
| **Public service** | 0 | 2 | 2 |
| **Other** | 0 | 3[37] | 3 |

4.12 Table 3 shows that most of the placements so far have been in organisations with a national remit. Of these 14 placements, 11 have been with the NHS Wales Shared Services Partnership (5) or in various sections of Value Wales (6). There has only been one placement in a local or regional organisation in North Wales (although other placements with national organisations have been based in offices in North Wales).

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[35] These secondments include the first secondment undertaken by the first cohort of trainees in 2011/12.
[36] These secondments include the second secondment undertaken by the first cohort of trainees and the first secondment undertaken by the second cohort of trainees, both in 2012 / 13.
[37] HE Purchasing Consortium; Countryside Commission; SEWIC

**Table 4: Coverage of placement organisations**

|  | Secondment 1 (n=9) | Secondment 2 (n=20) | Total (n=29) |
|---|---|---|---|
| **National bodies** | 4 | 10 | **14** |
| **North Wales** | 0 | 1 | **1** |
| **South west and mid Wales** | 2 | 3 | **5** |
| **South and south east Wales** | 3 | 6 | **9** |

## Delivery and outputs of Strand 3

### *Application process*

*Trainees' views*

4.13 Trainees had varying levels of knowledge of procurement when they applied. Two of those interviewed already had an academic qualification in the area and two others had joined the programme from an entry level procurement role. The majority of the remainder had only a basic understanding of public sector procurement upon joining the programme.

4.14 The trainees who came with existing academic training or professional experience in procurement had been recommended to apply to the programme by a lecturer or employer. Most of the remainder of interviewees decided to apply to the programme for 'positive' reasons including being attracted to the opportunities on offer *("I was attracted to the many training opportunities throughout the life of the programme"),* or because they viewed it as a career with better prospects than their previous roles *("I fancied a change from my existing role").* A further two interviewees applied simply because they were keen to work in the public sector.

4.15 Most trainees thought that the application process was rigorous but proportionate to the opportunity they were pursuing. A typical comment came from a trainee in the second cohort who thought that the assessment day was:

*"Intense, a challenge.... but that was the aim, to push you outside of your comfort zone."*

4.16 Where trainees were able to compare the opportunities to other similar programmes they were pursuing, it was considered to be about the same (for example, the assessment day for the HGT programme, was thought to be *"on a par with the accountancy assessment day in terms of difficulty"*).

*Host organisations' reasons for applying for trainees*

4.17 All line managers interviewed were supportive of the goals of the programme, and its mixture of training and practical experience. Typical comments were:

*"This is a good programme in the current climate of public sector cuts".*

*"Academic experience alone is not enough because the culture shock of working in a real procurement department can only be adapted to by work-based experience... applying knowledge learned on CIPS or ILM is different to learning it"*

4.18 The two main reasons given for applying to the programme were:

- To pass on skills / competencies to new staff (for example, line managers described the key skills and knowledge they have tried to impart on trainees); and,

- To access an extra resource to support existing staff or to pick up a project for which there is no existing capacity (as one line manager said: "We're a small organisation and there's a lot we can't do").

4.19 In most cases, line managers considered the application process to be straightforward with only time constraints noted as being a barrier to completing the required documentation. However several line managers and staff from successful organisations and those who had unsuccessful bids highlighted issues with the transparency of decisions taken. Two related issues were noted by more than a few interviewees:

- Poor communication between the programme management and the host organisations. For example, a few organisations reported that they were not fully aware of the likely skills of their trainee on arrival (or the future training they would be undertaking). A few line managers suggested that this could be addressed by a pre-secondment meeting at which trainee and future line manager could meet to discuss the secondment; and

- A perceived lack of transparency about how the decisions were made about the locations chosen for secondments from the bids and ensuring a regional and sectoral spread.

*Introductory training*

4.20 When trainees from both cohorts began the programme they first undertook a set of induction training which was designed to provide an introduction to procurement and the programme. For the first cohort this included an introductory 'Passport to Procurement' course, Prince 2 Practitioner course, Institute of Leadership and Management (ILM) level 3 and Chartered Management Institute (CMI) level 5 training. The second cohort only completed the passport to Procurement Course; they are due to undertake the Prince 2 training during summer 2013.

4.21 Most trainees were satisfied with the delivery of the training however a few trainees from cohort 1 reported that their induction process was too long. It lasted approximately nine weeks which was *"longer than anticipated"* and felt "*ad hoc*". One trainee from the first cohort thought that: "*The programme wasn't ready for us to start... they didn't have anything for us to do*". A few trainees also noted that the style of learning in the induction was quite passive and "felt like you were being talked at quite a lot" which they found not very stimulating.

*Delivery of ongoing training*

4.22 Most of the trainees have also been undertaking the CIPS professional qualification starting at level 4 and progressing on to level 5; the first cohort of learners will study for the level 6 award from next year. The exceptions to this are trainees who have already covered the CIPS content during their degrees. This training is delivered by the University of Glamorgan. Trainees are released from their secondment for two study days (which are normally consecutive), one revision day and one day of exams per module. Trainees undertake five modules a year to achieve the qualification. They are released from their secondment work for these sessions but also have to undertake some private study.

4.23 Feedback from trainees suggests that, on the whole, they are satisfied with the delivery of the training, although a few trainees have noted that the standard and style of delivery has been variable. This is likely to be a result of the different modules being delivered by different lecturers. For example, one trainee reported that some of the content has been "hard to make engaging" while other topics have been easier to relate to the work that trainees are undertaking on their secondments. A few trainees also noted that the course is delivered in a fairly academic manner, and that it has taken time to (re-)adjust to this type of learning.

4.24 Good practice in delivery is thought to be when tutors can add value to the theoretical learning with real world examples. As one trainee said:

*"The strength of the CIPS course is that you have an experienced procurement specialist training and that experience is worth all the theory in the world. It's clear to see the progress of the CIPS toward where you want to be as procurement professionals"*

4.25 Several trainees noted that they have had difficulty in completing coursework in the allotted study leave:

*"Doing CIPS, ILM and the placement at the same time has meant that October and November were really busy for me and I felt really pressured. Work is congested and clashed with my exams but I wasn't given any extra study time."*

4.26 However this experience is variable with a few trainees reporting that they had a supportive line manager in their secondment who ensured that they had sufficient time to undertake private study as well as attending the training courses.

4.27 As noted above, a few trainees have not taken the CIPS training as they have already covered the material in their degrees. They were not offered an alternative or equivalent training opportunity.

4.28 Trainees and the delivery staff also noted dissatisfaction with the venue (too cold, poor location, poor refreshments available) but it was noted that Value Wales is aware of these issues already.

***Delivery of the secondments and the support received by trainees***

4.29 The other major development activity for trainees on the HGT programme is to undertake three year-long secondments. Trainees have undertaken a mixture of projects while on placement. Around half of the secondments that trainees described were focussed on the core skills of procurement staff, such as writing ITTs and managing procurement processes. A few of the trainees had also been carrying out contract management which involved engaging with suppliers and other stakeholders. The remainder of the secondments discussed in the interviews were a mixture of projects which could be described as 'development activities'. This included:

- Projects to analyse previous tendering activities and save money in future based on this information;

- Work involving mapping potential suppliers; and

- Developing products or tools that can be used across several organisations (for example, a joint stock database for the NHS in Wales, and a handbook to support potential suppliers to local government).

4.30 One trainee indicated that on their first secondment she/he had filled a largely administrative role in a very small team with very little procurement work involved at all.

4.31 Most trainees were aware that they were able to access support from three sources if necessary: their line manager and colleagues in their secondment organisation; from a mentor appointed by the programme (who tends to be based in another organisation from that which is hosting the secondment; and, from the HGT programme staff.

*Line management and secondment organisation*

4.32 Most trainees reported a positive relationship with their line manager and colleagues at their secondment organisation. An issue highlighted by a few trainees from the first cohort was that they felt that their line managers (and the secondment organisations more broadly) had been insufficiently briefed on the programme's goals and the trainees' commitments to undertake training alongside their secondment. In these cases, trainees reported feeling "awkward" leaving to attend their training. Another said:

*"They had no idea of the commitment and amount of training that the trainees do... trainee organisations were not briefed properly... they thought they were getting a full time member of staff".*

4.33 Good practice in this area highlighted by trainees includes:

- Line managers showing flexibility in the sorts of projects trainees are working on. This includes responding to trainees' requests to alter their work to more closely match the training they were undertaking, their particular skills, or for interest' and

- Being given a specific project rather than being seen as just an extra resource or backfilling administration with very few learning opportunities.

*Mentors*

4.34 Most of the trainees had been able to gain something from the relationship with their mentor but it was not really heavily utilised in most cases. A typical response came from a trainee in the second cohort who said: *"It's nice to speak to someone out with the programme but I've not really had any concerns"*. Another trainee from the second cohort highlighted that their mentor's positions in a different organisation / sector was useful as it provides insight into other opportunities and a different context for procurement work. Their relative seniority also allows them to be used as a "*sounding board*". Where mentors appear to be of less use, it is because trainees reported having a very good working relationship with their line manager.

*HGT programme*

4.35 Most trainees noted that they also saw the central programme staff as a source of support if necessary. While in most cases trainees were satisfied with this support a few of the cohort 1 trainees noted that in the early stages, they felt that programme staff were not responsive enough to their (often straightforward, but important) queries. Line managers were generally not complimentary about communication from the programme team.

**Outcomes and impacts of Strand 3 to date**

***Outcomes achieved through the training programme***

4.36 One of the major attractions of the programme for the trainees was the programme of training on offer which would complement the work based skills being gained on the job.

4.37 There was a mixture of views on how useful this programme has been as a means of introducing them to the key concepts. A few trainees thought that it had helped to introduce them to the main concepts, and one noted that the resources provided had been useful reference materials.

4.38 However a few other trainees thought that the training had come too early for them to take full advantage of it as it was *"all quite abstract without any procurement experience"*. "I would appreciate going on the PMMS courses much more now". Others suggested that it was not really relevant to their secondment:

*"The content of the initial procurement training didn't show enough of an understanding of the trainees' roles or the nature of the programme we're on".*

4.39 Most line managers felt that their trainees had adequate skills upon starting the secondment (acknowledging that flexibility was required to ensure that the work they were set was suitable to their trainees' skills once they arrived). However a few noted that they thought the introductory training could be improved. For example, a line manager based in the NHS said:

*"I had some expectation that the formal training prior the placement might have prepared them better... Trainees need skills in negotiation, communication, excel oracle financial systems and e-procurement systems. None of these are being sufficiently covered in the formal training, but are being developed over time through placements."*

4.40 Delivery staff have indicated that the general skills should be obtained from the introductory training but the e-procurement skills will come with practice in the secondment.

*Training in leadership and management*

4.41 Most of the trainees appreciated the value of the training and noted that the skills developed would be helpful either in their future career or during their current secondment.  A typical comment was:

*"Because my role is a little more project based and management oriented, the Prince 2 and ILM training we've had so far has been particularly useful for me.  I think I've been really lucky so far".*

4.42 Trainees appear to have taken most learning from the Prince 2 training and several could highlight instances where the training had been used in their secondments (although this was obviously a reflection of the opportunities they had been given). Particular examples included:

- Technical skills learned in the Prince 2 training (such as developing Gantt charts, checkpoints, setting milestones, risk assessments, issue logs).

- Project management skills (and use of the training book as an ongoing resource – *"I use it as my bible...I use the whole methodology"*).

4.43 Other trainees described the future value of the learning from Prince 2; one trainee from the second cohort thought:

*"Prince 2 is an important qualification for anyone who is managing the procurement process.  Sometimes you'll have up to 12 [tenders] on the go at once."*

4.44 Interviews with trainees' line managers also indicate the current and future use of the Prince 2 training in this professional context.  One line manager based in a local authority noted how the training in Prince 2:

*"Allowed ….. to do some project management that she probably wouldn't have otherwise done as we operate along these lines".*

4.45 The ILM and CMI training were generally reported to have been less use for cohort 1 trainees in their secondments.  Several trainees

noted that the ILM training in particular was not really relevant to them because they have no management responsibility in their placements. A few trainees explained that the training should not have taken place at the start of the programme as *"we couldn't draw on our experiences"* and that *"this made the assignments difficult"*.

4.46 Several trainees were able to highlight instances where skills developed in these training courses had been used in their secondments. These examples were in relation to interpersonal skills developed:

*"Because of the skills learned in the ILM, I've felt more confident dealing with other team members as well as suppliers and partners".*

*Chartered Institute of Purchasing and Supply (CIPS) professional qualification*

4.47 The programme aims to support trainees to achieve the CIPS professional qualifications from levels 4 to 6. Interviews with stakeholders, delivery agents, line managers and mentors found broad support in the use of the courses in this programme. Most of the trainees reported that they had developed new skills and knowledge through taking this training. Particular areas of learning were thought to be: undertaking SWOT analyses, PESTEL analyses; benchmarking; and negotiation. Others described how the training and the knowledge gained was being used in more practical ways:

*"I'm using the CIPS training and principles without realising it most of the time and the course is giving some theory to my practice. The units on European law, procurement thresholds and risk assessments will be really useful. I'm starting to use ideas on assessing a critical supplier right now".*

4.48 Another trainee from the first cohort said that as time goes by she is seeing more of the topics covered in the CIPS training coming into her work. A few line managers also noted that certain activities undertaken in the secondments required the CIPS training. As one

noted, "She wouldn't have done some of the more specialist work without the CIPS training".

4.49 However, several trainees felt that the formal training they have been undertaking has not matched the learning undertaken in the secondment (either due to a timing issue or through the content of the work / projects being undertaken). As noted, this has been particularly evident in the ILM and CMI training. It was also noted by trainees undertaking CIPS training:

*"The placement has not been relevant to structured learning so has made my assignments just hypothetical exercises and more difficult to complete'*

*"They should have been looking for placements to complement the training."*

***Outcomes achieved through the secondments***

4.50 Trainees from the first cohort on their second secondment were able to compare and contrast the two experiences. There is evidence that different types of project complement each other with trainees learning different skills on each. As one noted:

*"I'm lucky to have had two such different placements because it's given me an opportunity to get a much broader perspective and cross functional vision".*

4.51 A line manager agreed, noting that: "Placements should build upon the last one in a strategic way and have a common thread".

4.52 Trainees (with supportive line managers) have sought to ensure that they get this mix of experience within one secondment. For example, a few interviewees described starting on more basic projects, for example, supporting a tendering process from start to finish before moving on to more strategic work within their host organisation.

4.53 Trainees also outlined the areas they thought their skills had developed as a result of the secondments. For those trainees undertaking more basic procurement activities, the most common skills and knowledge gains identified were:

- An understanding of the "general public sector tendering process" (something that, in most cases, was completely new to trainees on their first secondment);

- Writing ITTs and PQQs;

- Learning how to apply procurement processes within the relevant part of the Welsh public sector;

- Using the main electronic purchasing tools used in the Welsh public sector. These skills were thought by one trainee from the first cohort to be: "*A good starting point for someone with no tendering experience*"; and

- Communication and team working skills, particularly with suppliers and more senior colleagues. "*Being part of a large project team has enabled me to improve my team working skills and I've learned how to schedule and chair meetings*".

4.54 The trainees who had undertaken some of the more developmental projects had a more diverse set of knowledge and skill gains. These include:

- Developing familiarity with key organisations and stakeholders across the Welsh public sector; and,

- Understanding how procurement can be used to contribute to other key policy agendas for local authorities, such as improving the local economy and saving money. A trainee working on a project to improve collaboration in the commissioning and delivery of a core local council service reported that: "*I've been allowed to see the whole cycle of*

*procurement and to understand the role procurement plays in local authorities from a wider perspective*".

4.55 Line managers noted that the wide variety of potential projects meant that trainees' exposure to "useful procurement experience varies across the programme". Methods of reducing this risk were suggested:

- A work plan for trainees: "*There needs to be an individualised work plan based on the individuals' needs and goals. This way the skills and expectations of the trainee can be matched to what the client is offering*"; and

- Improved monitoring of placements: "*There is little to monitor and evaluate how the placements have worked and whether they have benefitted the individual's or the specific organisations' objectives set out in their bid.*"

### Longer term impacts

4.56 Looking to their future careers, nearly all trainees were positive about their prospects, and saw the benefits they had derived from the programme as being a key part of this. A few of the trainees thought that the mixture of training received, coupled with the breadth of experience they were gathering in their placements would help them in applying for permanent roles in future, which is the central goal of this part of the programme. Three typical comments in this area were:

*"Having a broad range of experiences is better than having four years' experience in the same organisation, as you are not moulded."*

*"Procurement is getting more and more important and a real growth sector in Wales and will continue to be a factor in improving corporate governance in the future. HR used to be seen as a bit of a backroom job and now it's developed into a key part of any organisation. I think procurement is going the same way".*

*"Maybe it is too early for me to take high level responsibility, but this is a great training ground and I'm well supported by internal senior staff to make the move up one day".*

4.57 A few other trainees also stated that they could see the progression of their skills through the increasing seniority and complexity of the tasks they were being given on the secondments. Others described the benefits they hoped for of having a "*diverse*" and "*high quality*" CV which includes several "*industry-standard qualifications*".

4.58 Despite these positive signs, a few trainees noted that they were concerned about ensuring they were able to progress into full-time jobs on completion of the programme. This was summarised by one trainee who said:

*"There are no formal guarantees of a job at the end of the programme ... I will have an uncertain future".*

4.59 Most line managers also reported that, despite being satisfied with the progress of their trainees, there were few jobs available in their organisation because of recruitment freezes and having to absorb internal staff who are at risk of redundancy in other parts of the organisation.

**Key summary points**

4.60 We have found that in relation to recruitment and allocation:

- Two cohorts have been recruited (22 in total) with 18 remaining and progressing; five have taken up jobs in procurement. A third smaller cohort will be recruited shortly to start in the late summer;

- Public sector organisations have been invited to bid for year-long secondments setting out the work they could offer the trainees. Eighteen organisations have had trainees. Several organisations have questioned the transparency of this process;

- There has been an even split of secondments between national and local/regional organisations with most of the former in Value Wales (6) and the NHS Shared Service Partnership (5) and most of the latter in local authorities (11) only one of which has been in North Wales;

- Most organisations sought the trainee because they saw value in the programme and could identify project activities which they could not do with their current resources;

- Some host organisations have indicated that communications about the process, the training offered to trainees and the needs of trainees could have ensured they were better able to meet trainees' expectations. A pre-secondment meeting has been proposed;

- Trainees are supported by a line manager in the host organisation as well as the Professional Development Manager in Value Wales and a mentor in another organisation who are expected to monitor the trainees' training and development plans; and

- Trainees were generally satisfied with the recruitment process and support.

4.61 We have found that in relation to the training and work on secondment:

- The trainees have mixed views about the extent that the introductory training provided knowledge and understanding before it would be useful to them; for some it was too early and too long. The first cohort generally felt that the ILM and CMI courses were not needed at the start although a few have found some value in the ILM course subsequently;

- Trainees were most positive about the Prince 2 training; line managers believed that the trainees were prepared to start although they would have benefited from information about the induction process;

- Trainees are generally satisfied with the content of the CIPS training, its relevance to the work they are doing and the opportunities to apply the

learning that they have. No alternative has been offered to the trainees who already have these qualifications such as shorter more advanced courses;

- Most trainees are satisfied with the secondment experiences they have had (although this has not been so in all cases even though the Professional Development Manager and mentor are there to put it on track), what they are learning, and what they are contributing to. Line managers are generally pleased with their contributions and the added value they bring;

- Most trainees are participating in procurement activities which are contributing to the added value which procurement is expected to provide to public sector organisations and some of the key activities to improve public sector procurement in Wales; and

- Most appear to be getting a good grounding in procurement activities and taking responsibility for activities with close supervision.

# 5   Strand 4: Funding for e-procurement projects

5.1   This chapter outlines findings in relation to Strand 4.  It outlines the management of this Strand (including the bidding and monitoring processes), a description of the main activities which have been funded, and the outcomes that have been achieved to date.  It is based on interviews with the key project staff at four of the funded sites and interviews of stakeholders and line managers.

**Organisation and management of Strand 4**

5.2   Strand 4 aims to provide funding to Welsh public sector organisations to implement e-procurement solutions in their organisations. It builds on the xchangewales programme which has developed e-procurement solutions in the Welsh public sector between 2008 and 2013 (and which is now called the e-Procurement Service, or ePS) with an aim to help the Welsh public sector to move from paper to electronic procurement and have the tools to take advantage of collaborative and bulk purchasing. It was recognised that some public sector organisations were not e-enabled to access all Wales or local contracts which could save them money or reduce their transaction costs for purchasing and payment of invoices.

5.3   So far five organisations have received funding under the HGT programme. In brief they are:

- **NHS Wales Shared Services Partnership (NWSSP).** This organisation initially received £150,000 funding (but this may increase to about £250,000 after a bid to continue the work is submitted).  This has been used to create an 'e-enablement team' of more than ten staff which is responsible for delivering support to Welsh Health Boards in implementing e-procurement technology, delivering support and training in the use of Oracle, and creating procurement-related business intelligence for NWSSP.  The team is also responsible for the expansion (and the maintenance) of a central e-catalogue of suppliers to the NHS.

- **Neath Port Talbot County Borough Council**. This project has received £50,000 which has been matched by the local authority. This funding has been used to firstly undertake a review of procurement processes in each department of the local authority. This has been completed; the next phase of the project is to implement a new e-procurement system on a department-by-department basis. Training has also been delivered to suppliers on how to utilise the new system.

- **Conwy County Borough Council.** This project has received £28,620 which has been match funded by the local authority. This funding has contributed to a £300,000 project being carried out by the local authority to implement an online system for requisitioning all goods and services procured by the council (replacing a paper-based system) and authorising invoices for payment. The funding from Strand 4 has been used to backfill staff so that they can work on the project and to pay the software provider's fees for integrating the system with the accounting and payment systems. The new system has been launched and after trialling in one area of the Council's business will be rolled out over 18 months to the rest of the Council's departments.

- **Denbighshire County Borough Council:** This project has received £37,146 to implement xchangewales's e-Trading project. This includes the roll out of the e-trading hub, and the e-trading management system. The project will support Denbighshire's corporate objectives around making the council's systems more transparent and delivering efficiencies (through the reduction of transaction costs and reduction of 'maverick spend').

- **Merthyr Tydfil County Borough Council**: This project has received £50,000. This was matched by the local authority with a further £20,000 accessed from the Welsh Government's 'Invest to Save' fund. This project aims to implement an electronic system for requisitioning all goods and services across all of the Council's directorates. This is replacing a paper-based system and is similar to the Conwy project.

The project has used external consultancy support to assist with delivery.

5.4   Four of these are local projects and one is a project which has national coverage.

***Process of bidding***

5.5   Organisations were invited to submit business cases to Value Wales to access these funds. There is evidence that this has not been well promoted with low awareness and relatively low take-up by eligible organisations although it is understood that a considerable number of public sector organisations have made slow progress with e-procurement, and that Value Wales had to approach organisations directly and ask them to bid.  It was also noted that one of the main barriers to bidding for funding was the limit of £50,000 that was placed on projects.  This has now been removed.  Organisations bidding must provide equivalent match funding. This can be a direct cash contribution or it can be provided in the form of internal management resources assigned to the project (or a mixture of both).

5.6   There are three eligibility criteria for which ESF funding can be used:

- Support with the technical integration of organisations' internal tools with xchangewales' e-trading tools;

- Assignment of project resource from internal staff to support e-trading; and

- Provision of specialist project expertise from an external party to support e-trading.

5.7   Bids were assessed by the programme board in partnership with the ePS board which also has to sign off any funding awarded.

5.8   Once they had decided to bid and ensured that they are eligible, projects generally reported that they received sufficient support from

Value Wales in the bidding process (to the extent that two local authorities reported that programme staff had written substantial parts of the bid).  A couple of criticisms were noted:

- Three of the projects thought that the benefits calculator used by xchangewales to make the case for these investments was not an accurate reflection of the savings likely in the time period for implementation: "*A much greater level of detail is required to properly represent the benefits versus the costs.  Xchangewales might consider altering their template to reflect this*".

- One organisation reported that there was not sufficient clarity provided over "*the mechanisms for the funding and what match funding could be applied to*". This may have been resolved in subsequent rounds.

5.9 In interviews with organisations that decided not to bid, the main reason given for not bidding was the prescribed list of products / projects which could be funded.  A senior procurement officer in the FE sector, for example, expressed frustration that only Bravo tools were available when they already utilise another tool which they consider to be superior. Some interviewees in the current projects and stakeholders have indicated that funding support to speed up implementation and assist with using the information available from the new systems would *"move collaborative purchasing forward and embed skills in the organisation"*.

*Ongoing monitoring*

5.10 Projects reported that there is very little direct contact with the programme team in Value Wales, after the funding has been awarded. Projects were collecting information on the time spent on the project to account for match funding but were not doing much beyond this.  As one reported:

*"We don't know what is expected of us in terms of reporting".*

5.11 In one case, interviewees noted that the evaluation case study visit was the most significant monitoring requirement of the project to date. However, project teams typically had internal reporting processes in place.  For example, one project manager described regular reporting requirements to his organisation's Board.  This requires reporting on two key project indicators (which are the proportion of invoices processed electronically and the number of suppliers that sign up to the e-catalogue each month) on a monthly basis allowing them to monitor progress:

*"At any one point if these indicators start to dip we can act on that".*

5.12 This project reported that it would be relatively straightforward to extend the submission of this reporting (or a version of this) to the HGT programme.

**Rationale for bidding**

5.13 In all cases, the funding had been used to contribute to activities that were difficult to fund from their mainstream funding sources or to accelerate activity that would have had to take place at some point. This ranged from:

*"The e-enablement money [from Strand 4] provided the catalyst.  If we had not got the money we would never have got this work off the ground."* to:

*"The fund helped us to put together a package of funding for the project and enabled us to backfill internal staff time allocated to the implementation which we could not have afforded."*

5.14 All reported that they aimed to make cost savings through reducing the time required for procurement administrative processes in their organisation and to make procurement savings from using the MI created.  All the local authorities interviewed (and some of the Health Boards that are supported by NWSSP) utilised paper-based

processes for their procurement activity and so were aware that they would be able to refocus resources on activities that could save money.  As one project manager noted, organisations in their sector: "*Have very little electronic invoicing with no development of this on the horizon either*".

5.15 Projects managers also reported that government targets were a driver for their bid.  For example, one of the local authority projects noted that there was a Welsh Government requirement to have e-procurement systems in place by 2016.

5.16 Interviewees also noted that developing their e-procurement processes would make other strategic objectives more achievable. Among these were:

- More collaborative sourcing and procurement with other local authorities (which is viewed as being impossible to implement using paper-based systems because *"we can't aggregate any of our spending and police it"*);

- Supporting small and medium sized enterprises (SMEs) in providing services to public organisations (for example, by having up-to-date profiles on e-catalogues which buyers can more easily access);

- Having more up-to-date and reliable information on what is being spent by the organisation, including what is committed; and

- Having improved business intelligence which would allow the aggregation of spending and opportunities to control purchasing which together should bring down the costs of purchasing goods and services.

**Implementation and outcomes achieved**

5.17 All projects were at an early stage of delivery.  One of the local authorities had been working on the project for less than two months, while all the other projects still had substantial progress to make before fully realising the longer term goals set.  As a result, they had

yet to reach any of the longer term outcomes, such as changes in procurement practices and savings. However, there had been significant gains made, largely at the strategic level, as a result of implementing the projects so far. These include:

- Senior staff having a greater understanding of the importance of e-procurement. A project manager from a local authority reported that: "Implementing this project brought to light the scale of the challenge surrounding compliance"; and

- More detailed information on procurement practices in their organisations largely derived from the mapping exercise that two of the funded projects have undertaken. This has improved senior managers' understanding of their organisations' purchasing operations.

5.18 Projects are also beginning to show some tangible evidence of outputs. For example, the NWSSP e-enablement team is able to report that there has been significant progress in the number of electronic invoices raised across NHS Wales and suppliers signing up to the e-catalogue since its formation.

5.19 There were a few common challenges identified across the projects. Two of the local authorities noted that there was unwillingness to change (motivated in part, one interviewee noted, by people whose role may change as a result of the implementation of an e-procurement system). Other challenges were noted that were outside the control of the projects. For example, several noted that success in their project would be partially reliant on Value Wales encouraging suppliers to sign up to the e-catalogue. "*This would help with successfully selling the programme in the organisation and achieving the benefits*".

5.20 While none of the projects has yet been able to evidence the longer term outcomes of their activities, several intend to examine impact in a systematic way once further progress has been made. As one project manager from a local authority reported:

*"We want to be in a position to be able to evaluate the e-procurement system's impact on procurement practice across the authority, is it consistent and joined up, and evaluate value for money, cost saving and other management information uses."*

**Key summary points**

5.21 We have found that:

- Strand 4 has funded a set of projects which aim to implement e-procurement solutions to Welsh public sector organisations' purchasing activities. Funding for these projects ranges from around £25,000 up to £150,000 which is generally more than matched by the organisation's investment;

- The funding has either accelerated activity that would have taken place at some point in the future (as a result of government targets to increase use of electronic procurement tools in Wales) or, funded activity that would not have been funded to the same scale from the organisations' own resources;

- The bidding process was relatively straightforward with substantial support being provided by Value Wales; however it is not clear how well advertised the funding has been to attract bids from organisations that are not progressing e-procurement solutions which can unlock economies and efficiencies in purchasing;

- All projects are still at a relatively early stage of delivery so the outcomes and impacts to be achieved are some way off, although the potential benefits are recognised in the organisations; and

- Projects could benefit from being accelerated if they were better resourced and several would benefit from supplier enablement of on-line catalogues, electronic orders and invoices.

# 6   Conclusions and recommendations

6.1   This chapter draws together the findings and analysis in chapters 3, 4 and 5 to consider how well the programme is performing against its aims and objectives and to address the research questions for the interim evaluation set out in section 1.2. From this some recommendations follow to improve the effectiveness of the programme and its added value and to prepare for the final evaluation.

**Overview of the programme**

6.2   Three strands of the HGT programme have progressed. The training for existing purchasing staff (Strand 2) and the traineeships (Strand 3) have been taken forward successfully. Grants to assist public sector organisations to adopt and use e-procurement tools appear to have been more slowly and less widely taken up.

6.3   The HGT programme is broadly on schedule to achieve its ESF targets except for the total number of participants[38]. Some action is needed to involve more specialist and non-specialist procurement staff in Strand 2 training to achieve the target.

6.4   It is evident that the programme is making a contribution to the objectives of Priority 4 ESF funding. Its support for workshops, skills training and enabling e-procurement are evidently contributing to public sector collaboration in procurement in some of the public sector organisations. Participants have or expect to have benefits which enable collaborative commissioning. Its support for trainees and up-skilling public sector employees who are engaged in procurement is evidently contributing to building the capacity of the public sector

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[38] Value Wales originally considered that the number of participants target was agreed to on the basis that they would not need to collect completed Participant Info & Equal Ops forms from participants who were not contributing to match funding. On seeking clarification from WEFO, it has been confirmed that these forms do need to be collected. It is likely the project will wish to re-negotiate this target and the most appropriate time to do this would be in Jan 2014, at the next re-profiling exercise

workforce to be more effective. Participants have gained relevant knowledge and skills and the trainees have brought new entrants who are quickly trained up in the sector.

6.5     At this point what is more difficult to discern is what impact the programme is having on the organisations which have participated in enabling collaboration and more effective purchasing. In part this is because the medium term outcomes as set out in the logic model (Annex 1) have not yet been achieved; in part because the programme provides only elements of a wider programme in Value Wales which is working towards these outcomes.

6.6     The HGT programme is also making a contribution to the Welsh Government's policy direction for procurement and is addressing some of the concerns raised by the McClelland review since the start of the programme. There continues to be a strong rationale for the programme to make an impression on the capacity and quality of purchasing specialists and non-specialists. It is evident that it is:

- successfully training up new entrants to specialist purchasing roles and engaging many of them in work which is focussed in improving the value for money of public sector procurement. Trainees report significant skill gains from their secondments which are supplemented by a range of high level training courses. Skills acquired in this training are, in most cases, being utilised in the secondments. Organisations that host trainees are gaining from their work and speedy learning, especially where trainees are able to work on projects independently;

- enabling training for the current workforce which is linked to e-procurement and should improve efficiency and enable collaborative and aggregate purchasing across the public sector. New training has been offered, training has been taken up by some non-specialists, and most have valued and benefited from the training; and

- assisting areas of the public sector which have not progressed e-procurement to take positive steps which are in most cases beginning to

yield some of the expected benefits. More significant impacts should be expected as they are fully implemented.

6.7 At this point it is more difficult to discern the extent that the programme provides added value (especially for Strands 2 and 4) and it has reached employees and organisations in greatest need. For example:

- while the small value grants in Strand 4 have assisted, they have not necessarily been deal breakers for e-procurement; larger grants would enable speedier implementation and change management[39];

- much of the training offered in Strand 2 is not new nor expensive so it is difficult to assess how much additional training has been taken up. It is accepted that some have been induced to take up training they would not have done (and benefited from it);

- the spread of trained public sector staff suggests that some areas/sectors have not participated as much as others;

- it is not possible to check the extent that organisations and individuals with training needs have participated in appropriate training;

- only a minority (38%) of participants in training report that the training has increased their competence by becoming more productive which would be likely to have an impact on their work; and

- only NHS and local authority organisations are yet to benefit from the grants.

**Consideration of the evaluation questions**

6.8 The table below analyses the findings to address each of the key questions for the interim evaluation.

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[39] These grants were capped at £50,000 for the first two years of the programme, but this cap has been removed allowing larger grants to be made.

| Question | Working well | Challenges |
|---|---|---|
| Continued relevance of the aims and objectives of the programme and its activities | ■ The programme continues to address challenges for procurement to contribute to Government targets for public sector collaboration, e-procurement and increased efficiency.<br>■ The programme is considered to 'fit' well against the main challenges for purchasing as set out in key strategic documents, such as the McClelland Review, and with other Value Wales activity such as the organisational health check and refreshed competency framework for the profession.<br>■ Stakeholders agree there is much to do in three key areas: addressing skills gaps; increasing the number of (qualified) procurement professionals in Wales; and, improving their status in public sector organisations. | ■ Accelerating the implementation of e-procurement tools and of skills shortages would need a larger programme of secondments and grants than HGT has funded.<br>■ Stakeholders questioned whether Strand 3 is of sufficient size to address the scale of the challenge in the procurement profession. |
| Delivery of expected activities and outputs | ■ 328 public sector staff have been on over 42 different training courses and 39 different workshops/meetings in Strand 2; with over 743 attendances. Training has been delivered to organisations across the public sector and in all local authorities in the Convergence area. Most were also positive about the relevance of the training or workshop to their job, role and | ■ It is not clear what proportion of the non-specialist procurement workforce has taken up the training opportunities in Strand 2 although it appears to be low; only about a third of the specialist workforce has participated (although some of these may not be eligible).<br>■ Take up of training has been variable across areas/organisations which suggests either |

| Question | Working well | Challenges |
|---|---|---|
| | organisation (80% or more).<br>■ 22 trainees recruited in Strand 3 and have been undertaking secondments in a range of public sector organisations (against a target of 24); the trainees who have left the programme have taken up permanent positions as procurement professionals in the Welsh public sector.<br>■ Five organisations have received funding to carry out projects to improve their e-procurement capacity. | lack of awareness of what is available or no need in some quarters for the training.<br>■ Trainees in Strand 3 have worked across the public sector although a considerable number of placements have been in Value Wales.<br>■ It is unclear how well the funding under Strand 4 has been advertised and whether this has reached all organisations in need of help to accelerate e-procurement. |
| Delivery of expected outcomes and impacts | ■ Nearly all beneficiaries of Strand 2 report improved knowledge and skills in the area covered by the training sessions or workshops they took part in. A majority (53%) also report that the training opportunity led to improvements in procurement practices once they returned to their workplace.<br>■ Trainees in Strand 3 report developing a range of skills based on their experiences in the secondments. In addition, there were positive findings in relation to most of the training they have received (particularly the CIPS programmes and Prince 2). These skills are consistent with those expected of a public sector procurement professional. | ■ Only around one-third of beneficiaries believed that the training/workshop had influenced supplier management processes (32%) and contracting procedures (41%) in their organisations (although these figures may be expected from what is a relatively short training input, in most cases).<br>■ only a minority (38%) of participants in training report that the training has increased their competence by becoming more productive.<br>■ A few trainees have not been able to use the training because of the work experience offered.<br>■ In some cases, the funding available in Strand 4 is not of sufficient scale for |

| Question | Working well | Challenges |
|---|---|---|
| | Most hope to progress into more senior roles in this area once they complete the programme and are positively engaged in the programme. Many are working on procurement activities which are making a difference.<br>■ All organisations which have received funding under Strand 4 report that it has helped them to (at least) begin ambitious e-procurement projects. They are also able to report positive strategic outcomes (for example, an improved understanding of e-procurement among senior management) and in a couple of cases a more tangible impact on the uptake of electronic invoicing and an e-catalogue among buyers in their organisations and suppliers. | organisations to make fast progress towards the benefits expected in the next two years although it enables e-procurement and access to the benefits. |
| On track to deliver outputs and outcomes | ■ Strand 2 is contributing to the targets on employers assisted and course completions and is on target to exceed the required numbers of these by the end of the programme. The training is having a positive impact on the majority of trainees' skills and knowledge.<br>■ Once new trainees are recruited in the next few months Strand 3 is likely to be on track to deliver the required deliverables in | ■ Strand 2 needs to engage more specialist and non-specialist procurement staff to increase its contribution to the target total number of participants.<br>■ It is unclear whether the training in Strand 2 is being delivered to the employees with the most significant skill needs (either because of their job role or the skill gaps they might have). This may be reducing the potential impact of the training. |

| Question | Working well | Challenges |
|---|---|---|
| | relation to the number of secondments undertaken. There is also evidence from interviews with a sample of trainees that their skills and competences are developing in a manner consistent with the goal of developing a new cohort of procurement professionals.<br>■ The projects funded in Strand 4 are at an early stage in their delivery however there are signs that the e-procurement activities funded will have a positive impact in the longer term provided that post-implementation they have plans to achieve the expected benefits. | ■ There is an ongoing risk that trainees will leave the programme. This increases as the programme progresses as trainees are likely to be keen to secure permanent employment.<br>■ It is unclear whether sufficient funding has been allocated within Strand 4. Some of the desired outcomes of these projects are likely to be realised over the long term and are contingent on a range of external factors (such as the readiness of suppliers to respond electronically).<br>■ |
| Efficiency and effectiveness in producing outputs and outcomes | ■ Feedback on the quality of the delivery of training in Strand 2 was very positive indicating widespread satisfaction with the providers.<br>■ Public sector organisations could not have organised such a range of training themselves.<br>■ The delivery model of Strand 3 is well liked by the trainees and host organisations (who themselves have gained a lot from hosting trainees).<br>■ The funding available in Strand 4 has helped to bring forward activity in this area | ■ The process for disseminating Strand 2 training opportunities to non-specialist procurement staff may not be effective.<br>■ For the first cohort of trainees in Strand 3, there is evidence that the induction stage was too long and the training too early although this has been partly addressed with the second cohort. Secondment organisations also noted that they did not receive sufficient information in advance of trainees arriving (including key issues such as their skills and training commitments). The selection process for secondment |

| Question | Working well | Challenges |
|---|---|---|
| | in all of the organisations funded and has helped some of them to access more funding from their own organisations. | organisations is not clear and there is a perception among some bidders that there are sectoral and geographical gaps in the allocation of these secondments.<br>■ It is unclear how widely the funding under Strand 4 was advertised and what processes were taken to select projects against funding criteria. |
| The added value of the programme | ■ Strand 2 has included some new training and workshops and attracted non-specialists to training in e-procurement and other generic skills.<br>■ The activity funded under Strand 3 is completely new and viewed by stakeholders as being an example of best practice.<br>■ The funding under Strand 4 has accelerated activity that would have taken place in the coming years. | ■ It is unclear whether the training delivered under Strand 2 has displaced training that would have been undertaken by public sector organisations (particularly since some of the meetings/workshops which have been claimed for may have taken place without the programme) or substituted for training which would have been purchased.<br>■ Strand 4 grants in some cases are only a small proportion of the cost of the implementation of e-procurement. |
| Ability to undertake a final evaluation | ■ There is useful MI available on the demographic characteristics of Strand 2 beneficiaries.<br>■ Trainees and most line managers in Strand 3 were happy to take part in the evaluation and provided useful reflections on their experience to date.  This level of engagement could be expected in a final | ■ There are gaps in the Strand 2 MI, particularly in relation to the training courses commissioned (for example, learning outcomes, length) and attendances which would help with analysis of who is taking up what courses.  There is also information missing on the purpose of the meetings, and who was eligible to take part with funding |

| Question | Working well | Challenges |
|---|---|---|
| | evaluation.<br>■ Most of the projects funded under Strand 4 were available to take part. A few were able to provide supportive documentation of the outcomes they were beginning to achieve. | from the programme.<br>■ A few line managers declined to take part in the Strand 3 research; some MI is not collected for all participants in Strand 2; one of the funded projects in Strand 4 did not take part in the research.<br>■ The survey of participants in Strand 2 does not work so well for those who took part in meetings and workshops which are not necessarily training events. The survey also needs to capture the depth of training to compare to outcomes and impacts.<br>■ Impacts of e-procurement would need to be measured from savings on staff and purchasing goods and services, speedier payment, and commitment accounting for example.<br>■ A wider range of stakeholders (heads of procurement and senior managers in public sector bodies with oversight of savings and procurement efficiencies and economies) would provide corroboration of impact and added value although with very few organisations that have had no or little contact with the programme, it is difficult to assess the counterfactual. |

6.9     As a consequence we can address each of the aims of the interim evaluation.

***Progress with the programme's inputs, activities, outputs and outcomes***

6.10    The programme has made most progress with Strands 2 and 3 and has established a trainee programme with a wide range of secondments within the public sector and a programme of training and workshops to address skills needs in procurement. Grants in Strand 4 have gradually been taken up by a few organisations and sectors.

6.11    The programme is broadly on target to achieve the required ESF deliverables with the number of employers assisted already achieved, over half the participants in training courses achieved and the secondments on course subject to further recruitment this year. To increase the total number of participants Strand 2 needs to reach out to more specialist and non-specialist staff although Strands 1 and 5 should be expected to contribute to this target over the next two years.

6.12    Against the outputs and outcomes in the logic model there is strong evidence that:

- Training beneficiaries have generally improved their knowledge and skills; many have applied what they have gained;

- The trainees have mostly gained competences that are enabling them to make a contribution to desired improvements in procurement; most appear to be committed to using the knowledge and skills they are acquiring to work in the sector as procurement specialists; and

- A few public sector organisations are being enabled to utilise e-procurement solutions.

6.13    As yet medium term outcomes have not yet been secured although Strands 3 and 4 should be expected to achieve these. Strand 2 will

also achieve these if the training and meetings have a cumulative effect on participants' competences which can be exploited by public sector organisations. More targeted and intensive training for specialist and non-specialist staff may assist this.

*Lessons for improving the delivery of the project*

6.14 There are a few ways in which each strand could be managed differently to improve effectiveness and the outcomes achieved. Learning appears to be taken on board in the way the programme strands have been adapted in the first three years so this should not present a problem.

6.15 In Strand 2, it is important for Value Wales to ensure that the training is targeted on those with skills needs in procurement roles (both specialist and non-specialist) and that the learning contributes, as well as Strand 3, to raising the profile and capability of staff who work on procurement throughout the public sector, preparing the leaders of tomorrow who are already within roles, and providing the competence to apply learning to making improvements from procurement. A greater depth of training and participation is likely to have a bigger impact. As a consequence:

- The process of advertising the training opportunities should be reviewed to ensure all relevant organisations, and staff within them, are aware of the training; many will not be procurement specialists;

- Courses and other activities should be clearly marked for the target learner (experience, role, learning outcomes expected) so that they address skill needs which have a high likelihood of being used in the workplace. The provider should undertake screening if this is not already in place;

- Future training should be focused on new skill gaps identified based on the competency framework being developed by Value Wales and responses to the intended fitness reviews;

- Monitoring information should capture details of the attendees and the courses to enable a fuller analysis to test the appropriateness of take up and the relationship between the depth of training activities and learner outcomes; and

- Workshops should better demonstrate action learning and contributions to networks and collaborative purchasing initiatives.

6.16 It will be important for Strand 1 to enable greater opportunities for procurement specialists and ensure training is used in public sector organisations.

6.17 In Strand 3, it is important for Value Wales to ensure that the secondments make contributions across the public sector in organisations which need to make progress as well as providing all the trainees with skills and appropriate opportunities. In the main this has been achieved but focusing all placements on activities to take forward purchasing across Wales will help with potential sustainability and securing a return on the investment. As a consequence:

- The process for selecting secondment organisations should be explained to all potential bidders with an emphasis on providing supported learning experiences as well as contributing to a public sector organisation's improvement plan for procurement;

- It may help to spread the benefits of secondments and demonstrate transparency to the wider sector if fewer placements were in Value Wales and there was a wider range of public sector services involved;

- Information about the traineeship and the trainee should be provided to secondment organisations in advance of trainees arriving with a pre-secondment meeting to start to shape the trainee's work, training and development programme alongside the programme manager; and

- ILM and CPM training should be offered later in the programme.

6.18 In Strand 4, it is important for Value Wales to ensure that the grants make a difference to the pace of the implementation of e-procurement and the use of the tools and capabilities (complemented by the training available). Larger grants and collaborative grants will help to ensure this. As a consequence:

- The process of promoting the grants should be reviewed to ensure that all eligible organisations across the public sector that have needs to accelerate implementation and use of e-procurement are aware of the funding opportunities and assisted to put together bids;

- Grants which will enable non-procurement specialists to accelerate implementation or release procurement specialists to undertake projects (through backfilling their other roles) would assist the process of change management in public sector organisations; and

- Projects need to be able to monitor the outcomes and impacts of the systems they have introduced so should be guided on this.

***Practical means to evaluate the impact of the programme upon its completion***

6.19 The final evaluation will need to evidence the programme's progress towards the medium term outcomes and contribution to impacts in the logic model, that the programme has provided added value, and whether it has made a sustained difference to procurement in Wales.

6.20 The following will assist a final impact evaluation of the programme:

- The database of Strand 2 beneficiaries of training courses and meetings/workshops attended;

- A database of Strand 3 trainees and secondments and a willingness of trainees and most line mangers to take part in qualitative research; and

- Grant bids and project plans for Strand 4 beneficiaries.

6.21 We have found from completing the interim evaluation that the MI from the training needs to be added to, any survey of training beneficiaries should separate training from meetings and workshops, and engaging organisations who have not heavily participated is difficult at this point in the programme. As a consequence we would suggest:

- Strand 2 MI should include information on the participants' role and experience to enable analysis of the benefits and the appropriateness of courses for attendees with further information about the courses themselves; any accreditation or testing of attendees; length of course; whether part of a series or are delivered separately; key learning outcomes; and level/experience of expected participants;

- The following should be collected on Strand 3 trainees (qualification achievements, any progression to jobs with a post departure six month check up);

- Grant aided organisations should be advised to be able to demonstrate achievements including savings as a result of their implementation of e-procurement tools;

- Having a separate survey or a sample of interviews to cover outputs and outcomes of the meetings/workshops since these should be expected to have different outcomes to training;

- Continuing to interview a sample of trainees and line managers/mentors about the value of the training and secondments and the impact they have had in the organisations they have been placed;

- Adopting a case study approach to the grants so that a wider range of the longer term outcomes which should be achieved over two years can be captured in the organisations and their partners that have not taken place in the timescale of this evaluation; and

- Engaging a wider range of stakeholders (heads of procurement, senior managers of public sector bodies with oversight of savings and procurement efficiencies and economies and collaborations, leaders of all the networks of procurement professionals in the public sector) to provide corroboration of impact and added value.

6.22 With an expectation that all public sector organisations in the Convergence Area and most outside will have benefited a counterfactual cannot be established. However in selecting organisations to interview about the programme's impact, those who have heavily participated and those which have not should be compared.

**Recommendations**

6.23 We would recommend that Value Wales and the HGT programme board consider the action suggested in section 6.2.2 to improve the effectiveness, impact and added value of the current strands of activity in the programme.

6.24 We would recommend that the HGT programme team in Value Wales take steps to ensure the MI required for a final evaluation is collected as set out in section 6.2.3 and that the Welsh Government note the other elements needed for a final evaluation.

# Annexes

# 7 Annex 1: Logic model and evaluation framework

**Figure 16: Logic model**



**Context for the programme**: the Welsh Government spends £4.3 billion a year on external goods and services. In recent years, the practices underpinning the spending of this money have come under increased scrutiny, primarily as a result of reduced public spending. The 'Transforming Procurement through Home Grown Talent' (HGT) programme has been funded by the Convergence Area's ESF Programme's priority 4, which seeks to improve the efficiency and effectiveness of public services.

**Rationale for programme**: Several recent reviews of public services in Wales (and other parts of the UK) have noted that there are important issues to address in public sector procurement practice. These are skills gaps within the procurement profession in Wales; and skills shortages in procurement. The potential benefits that it efficient and effective procurement can bring, are not sufficiently recognised among senior public sector budget holders. There is an insufficient number of procurement professionals working in the Welsh public sector. Public sector organisations lack people with the specialist project management skills to implement the xchangewales programme (and therefore cannot capitalise on the efficiency and effectiveness of e-procurement solutions).

### Inputs

**Total spend:**
£10,903,715 (c. £5.2m from Welsh Govt; c. £5.7m from ESF)

**Strand 2:** £971,498

**Strand 3:** £2,830,444

**Strand 4:** £2,287,344

Project management: £1,120,203

Cuts across all strands: £2,831,380

*(Strand 1: £587,846; Strand 5: £275,000)*

### Activities

Strand 2: delivery of training to existing procurement workforce. This includes a range of short courses on issues of relevance to the profession (delivered to a large number of staff), and the funding of CIPS professional training at levels 4, 5 and 6 to more focussed group)

Strand 3: delivery of a multi-year training programme comprised of up to 3 year long secondments with public sector organisations and delivery of a range of high level training.

Strand 4: funding for public sector organisations to implement e-procurement solutions in their organisations.

### Outputs

1,396 public sector employees from the Convergence area of Wales, of whom 52% are female. 50% of these should be public sector workforce, and 50% from management.

72 secondment placements

68 employers assisted or financially supported (through provision of CPD opportunities for staff).

20 dissemination activities (this will largely be delivered through Strand 1)

### Short-term Outcomes

**Strand 2**: beneficiaries have improved knowledge and skills to apply in their procurement roles

**Strand 3**: beneficiaries entering the public service profession have a high level of skill and knowledge in relation to procurement and the potential to be promoted to management.

**Strand 4**: more public sector organisations utilise e-procurement solutions.

### Medium-term Outcomes

**Strand 2**: beneficiaries use new skills / knowledge to operate more efficiently and effectively in their workplace (e.g. in supplier management, opening procurement more effectively to SMEs and in better risk management).

**Strand 3**: beneficiaries entering the profession use their high level skills to become leaders of the procurement profession in the Welsh public sector

**Strand 4**: more public sector organisations are able to capitalise on the benefits of e-procurement solutions (e.g. more efficient procurement exercises / greater opportunities for collaboration with other organisations).

### Long-term Impacts

There are fewer skills gaps in the profession in Wales (and a greater number of professionals per pound spent).

Specialist procurement professionals have a higher status in public sector organisations.

More public sector organisations utilise e-procurement tools effectively.

Resources are more efficiently spent leading to savings to the public purse.

**Table 5: Evaluation framework**

| Element of logic model | Indicator | Tool / method of evidence collection |
|---|---|---|
| **Rationale** | Evidence base for activities selected | *Scoping interviews; document and MI review; stakeholder interviews; interviews with grant recipients.* |
| **Inputs** | Funding allocations and spend | *Document and MI review.* |
| **Outputs** | An assessment of progress to date against the key targets. In Strand 2, this will include a calculation of the number of short and longer up-skilling courses completed to date; in Strand 3, this will be measured against the number of secondments which have taken place and training undertaken by the beneficiaries; and in Strand 4, this will largely be measured by a calculation of the funds allocated and spent to date against the target. | *Document and MI review.* |
| **Short-term outcomes** | Strand 2<br>■ Beneficiaries have improved knowledge and skills to apply in their procurement roles<br>Strand 3<br>■ Beneficiaries entering the public service profession have a high level of skill and knowledge in relation to procurement and the potential to be promoted to management.<br>Strand 4<br>■ More public sector organisations utilise e-procurement solutions. | *Survey of all beneficiaries to date (both strands 2 and 3); telephone interviews with a sample of beneficiaries and their line managers; interviews with grant recipient organisations; interviews with delivery agents; interviews with stakeholders.* |
| **Medium-term outcomes** | Strand 2<br>■ Beneficiaries use new skills / knowledge to operate more efficiently and effectively in their workplace<br>Strand 3<br>■ Beneficiaries entering the profession use their high level skills to become leaders of the procurement profession in the Welsh public sector<br>Strand 4<br>■ More public sector organisations are able to capitalise on the benefits of e-procurement solutions | *Survey of all beneficiaries to date (both strands 2 and 3); telephone interviews with a sample of beneficiaries and their line managers; interviews with grant recipient organisations; interviews with delivery agents; interviews with stakeholder.* |
| **Long-term impacts** | ■ Increasing status of public sector professionals.<br>■ Fewer skills gaps in the profession in Wales.<br>■ More public sector organisations utilise e-procurement tools<br>■ Resources are more efficiently spent | *Given that this is an interim evaluation, we would not expect to see much evidence of the long-term impacts at this stage. However across all research tasks we would check whether there is early evidence available of these longer term outcomes being achieved.* |

7.1 Assessment of additionality: we will assess leakage (such as beneficiaries from outside the target area), using analysis of the MI; deadweight (such as beneficiaries who already have a similar qualification) through the beneficiary interviews, survey and MI analysis; substitution (such as management activities that would have improved services) through interviews with beneficiaries and

line managers; and displacement (such as other training that would have been undertaken by the beneficiaries) through the interviews with beneficiaries and line managers.

# Annex 2: Attendance at courses and meetings in Strand 2

**Table 6: Summary of attendance at courses, workshops and meetings**

| | |
|---|---|
| **Courses delivered by PMMS** | |
| Competitive Dialogue | 1 |
| Construction Training | - |
| Contract Management | 3 |
| EU Compliant Supplier Selection & Contract Award | 6 |
| EU Procurement an Introduction | 3 |
| EU Procurement Directive | 59 |
| Exploring Terms & Conditions | 9 |
| Frameworks and Mini Competitions | 2 |
| NHS Differences Training | 4 |
| PMMS - Commercial Awareness | 22 |
| PMMS - Contract Management Training | 14 |
| PMMS - Evaluation (Procurement Passport Courses) | 22 |
| PMMS - Introduction to Negotiation | 15 |
| PMMS - Introduction to Procurement | 5 |
| PMMS - Passport to Procurement | - |
| PMMS - Procurement Policy (Procurement Passport Courses) | 17 |
| PMMS - Specification Writing (Procurement Passport Courses) | 16 |
| TUPE Essentials | 12 |
| **Total** | **210** |
| **Courses developed and delivered by Value Wales** | |
| CIPS Finance for Purchasers | 5 |
| CIPS Strategic Public Sector Programme Management | 5 |
| CIPS Strategic Supply Chain Management | 5 |
| CIPS Supply Chain Management in Practice | 2 |
| Community Benefits / Food / SRA Training | 2 |
| Community Benefits including Measurement Tool Launch | 7 |
| Community Benefits Legal Workshop | 20 |
| Community Benefits Workshop | 12 |
| Corporate Procurement Services Training | 1 |
| EIB Training | 1 |
| eSourcing Training | 1 |
| Invest 2 Save Training | - |
| Merthyr Tydfil- Blended Training | 5 |
| Sell2Wales Training | 2 |
| SQUID - Construction Training | 5 |
| SQUiD SQUizard orientation | 17 |

| | |
|---|---|
| SQUID Training | 34 |
| SQUID Training - Consultants | 6 |
| SQUID Training - Generic | 2 |
| SQUID Training - RSL/Housing | - |
| SQUID Training Workshop | 7 |
| Training with Perm Sec and Michael Hearty | 1 |
| Value for Money Training | 1 |
| Public Procurement and Welsh Language | 9 |
| **Total** | **150** |
| **Eligible meetings** | |
| 1-2-1 Work Review - Trainee with Line Manager | 9 |
| All Wales Community Equipment Items | 16 |
| All Wales eTrading Customer User Group | 5 |
| Collaborative Procurement Working Group | - |
| Community Equipment Items Task and Finish Group Meeting | 19 |
| CPPSG | 13 |
| Creative Procurement Forum | 9 |
| Customer Focus Group | 2 |
| Economic Impact Assessment Group | 5 |
| Efficiency and Innovation Board - Savings Workshop | 45 |
| ePayments SPGT Requirements Workshop | 3 |
| ESF Project Board | 9 |
| eSourcing SPGT Requirements Workshop | 8 |
| eTrading SPGT Requirements Workshop | 7 |
| EU Directives Workshop | - |
| Home Grown Talent Assessment Centre | 1 |
| ITEAS (III) Customer Focus Group | 5 |
| Market Position Statements | 9 |
| Media Agency Services Consensus Score | - |
| Mentor Training | 9 |
| Mid Term PMR Review | 1 |
| North Wales Construction Framework Workshop | 6 |
| One to One Meeting where subject is collaborative procurement | - |
| One to One/Placement Objectives - Trainees | 3 |
| PMR - Trainees | 1 |
| Pre PMR Meeting - Trainees | 1 |
| Progress Review Meeting - Trainees | 7 |
| Collaborative Procurement Project Meeting | - |
| Source Regional Project- 1-2-1 Work Review | - |
| South Wales Regional Event | 18 |

| | |
|---|---|
| Stationery and Paper Project | 1 |
| Supervision - Trainee | 7 |
| TPEP Assessment Centre | 2 |
| Tyres Project Meeting | - |
| Vehicle Hire Task & Finish Group | - |
| VFM Telecoms Customer Focus Group | 3 |
| Welsh Purchasing Card Customer User Group | 27 |
| Welsh Purchasing Consortium Officer Group Meeting | 25 |
| WG Open for Business Event | 56 |
| Working with Supported Businesses Workshop | 13 |
| **Total** | **345** |
| **Total courses, workshops and meetings** | **705** |
| **Unknown courses, workshops and meetings** | **38** |

# Annex 3: Demographic profile of survey respondents

7.2 There were 160 respondents to the survey.

## Age

7.3 Nearly two-fifths of respondents were aged between 45 -54. Around one-fifth of respondents (roughly 30 individuals) were from each of the age groups 26-34; 35-44 and 55-64. There were only two respondents aged under 25 (Figure 17).

**Figure 17: Survey respondents by age group**
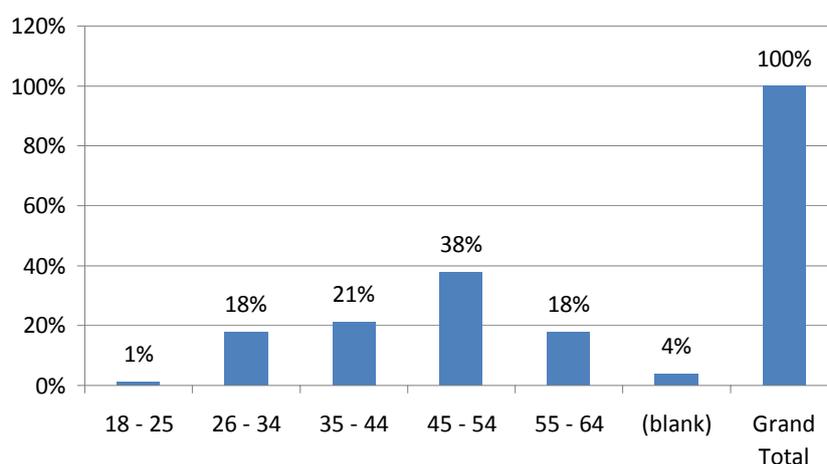


## Gender, ethnicity and disability status of respondents

7.4 Slightly over half of respondents to the survey were female (52%). 44% were male, while 4% either left the question blank, or preferred not to say.

7.5 Around 95% of survey respondents described themselves as White (Welsh; English; Scottish; Northern Irish; Irish; Gypsy or Irish Traveller). Five respondents did not state their ethnicity; one identified as Black/ Black British and one as Mixed/ Multiple ethnic groups.

7.6   Almost all beneficiaries had no disability, with just under 5% reporting themselves as having some disability.

**Employment**

7.7   Just over half (56%) of respondents worked in local government. Central government departments/ agencies supplied around 16% of beneficiaries, whilst public services/ quasi public sector bodies supplied around 10%.  'Other' organisations accounted for a further 15% - these included engineers, consultants and higher education bodies.  Slightly over half of respondents did not work in a specialist procurement role (55%).

7.8   Two-fifths of respondents had been in their role for five or more years, and around a fifth had been in their role for each of 1 – 3 years or 3 – 5 years. The smallest proportion (13%) had been in their role for less than one year.

7.9   90% of respondents were in full-time employment; 5% were in part time employment and 2% were in temporary employment.  3% did not answer the question.

**Courses undertaken**

7.10  Table 7 shows that the respondents to the survey have undertaken 31 training courses / workshops as part of Strand 2.  The two largest courses / workshops represented in this survey are the SQUID training and Community Benefits which are two of the highest attended courses on the programme (see 0).

**Table 7: Respondents by course / workshop**

| Course | Number of participants |
|---|---|
| SQUID Training (various) | 60 |
| Community Benefits (various) | 51 |
| EU Procurement Directive | 23 |
| Contract Management | 17 |

| Course | Number of participants |
|---|---|
| Introduction to EU Procurement | 15 |
| Frameworks and Mini Competitions | 13 |
| Public Procurement and Welsh Language | 13 |
| Market Position Statements | 12 |
| Competitive Dialogue | 11 |
| EU Procurement and Introduction | 11 |
| WG Open for Business Event | 11 |
| Commercial Awareness | 10 |
| CIPS Strategic Supply Chain Management | 8 |
| EU Compliant Supplier Selection and Contract Award | 8 |
| Exploring Terms and Conditions | 8 |
| Mentor Training | 8 |
| Passport to Procurement | 8 |
| Finance for non-Financial Managers | 7 |
| TUPE Essentials | 7 |
| Working with Supported Businesses Workshop | 6 |
| CIPS Strategic Public Sector Programme Management | 5 |
| CIPS Supply Chain Management in Practice | 5 |
| All Wales Community Equipment Items | 4 |
| eTrading SPGT Requirements Workshop | 4 |
| CIPS Finance for Purchasers | 3 |
| eSourcing SPGT Requirements Workshop | 3 |
| Supply Chain Management | 3 |
| ePayments SPGT Requirements Workshop | 2 |
| Profitable and Practical Negotiation | 2 |
| Customer Focus Group | 1 |
| North Wales Construction Framework Workshop | 1 |

## Annex 4: Interviewees

**Stakeholders**

7.11 Interviews with the following were undertaken: Alison Standfast, Value Wales; Garry Clifford, Bangor University; Hollie Edwards-Davies, Welsh Government; John McClelland CBE (independent consultant); Julie James AM, Welsh Assembly; Steve Robinson, Cardiff City Council (deputising for Jon House).

**Delivery agents**

7.12 Dr Christopher Lee, Dr Kathryn Ringwold and Helen Colley (all from University of Glamorgan); and Dave Porter (PMMS).

# Annex 5: Research tools

7.13 This section includes the main research tools to be used in this evaluation.

**Interviews with Strands 2 and 3 beneficiaries (for telephone interviews)**

*Introduction*

7.14 Begin by introducing the evaluation, explaining, as necessary that as the programme is at (approximately) its halfway stage, it was felt to be an appropriate time to assess its effectiveness to date, and possible ways it might be improved. We are therefore keen to get the interviewee's perspective on the value and effectiveness of the training they have received, especially in terms of how it has led to changes in way they do their job 'on the ground' within their organisation.

*Background and context*

7.15 Understanding the individual. As necessary/relevant, confirm or explore the following:

- The interviewee's experience (length and type): for Strand 2, aim to understand the interviewee's position in their organisation. For Strand 3, aim to understand previous work and academic experience prior to joining TPEP, and types of secondment(s) / training undertaken to date.

- Explore their previous training and qualifications: did they have previous specialist qualifications / training in procurement? If so, to what level? What sort of broader training have they had (i.e. not procurement-specific)?

- Why they participated in the programme – explore how they found out about the programme, how they applied, and why they took part. What were their initial expectations about the programme? Did they have clear

expectations? What were they hoping to achieve by participating in the programme?  For Strand 2: what role did their own manager / colleagues play in their decision?

- For Strand 2: what training would the normally have done of the period of the CIPS training?  What CPD do they normally do in relation to their current and likely job needs (i.e. to face future challenges)?

*Views on the training delivered*

- Which elements did they feel were the most useful, relevant and applicable? Why?

- Were any elements less useful, appropriate or valuable? Why were they not relevant? Did they cover familiar ground?

- For both of the above questions, explore against each module of the CIPS qualification, and for Strand 3 beneficiaries, explore against the other training (PRINCE 2, ILM etc) they have undertaken while on the programme.

- Explore the support they have received from their employer / secondment?  Has this been sufficient?  What more could have been provided?  How supportive have line managers / colleagues / mentors been?

- Explore views on teaching and support arrangements– quality of teaching; time required to participate and complete assignments; support given by training provider.

- Overall, did the training deliver against expectations? If not, where were the gaps and how could these be addressed in future?  How relevant are the qualifications for public sector procurement?

- How relevant are the qualifications undertaken to the procurement profession? Probe to assess whether there are any changes taking place in the procurement profession.

***Views on the secondments (ask for Strand 3)***

- Ask interviewees to describe their current and (if relevant) previous secondments.

- What elements of your secondment / which secondment do you consider to have increased your knowledge / skills / competence? Which have not? How have the secondments enabled you to apply learning from the courses?

  *Please note: each host organisation put together a business case for a project for the secondee to undertake over the course of their year-long secondment. Explore how the projects have gone: positives / negatives etc. For those interviewees who have undertaken multiple secondments, encourage them to compare and contrast their secondments. Typically, secondment projects relate to three types of activity: implementation of e-procurement solutions; supplier performance management; and some are more related to policy (although there may be a small number of other types of project too).*

- What, if anything, have you learned from your mentor / line manager / colleagues in the secondment organisation?

- What support have you received from the central resource (i.e. the programme itself, and the Professional Development Manager and Mentor)? How could this be improved?

- Overall, have the secondments delivered against expectations? If not, where were the gaps and how could these be addressed in future?

***Impact of training***

*Explore what has been learnt*

- What have they learnt as a result of taking part in the course(s). Explore:

    – Specific procurement knowledge / skills / competence;

    – Leadership and management skills (likely to be particularly important for Strand 3 beneficiaries).

- In what areas has the training made a positive contribution to their knowledge and understanding? How and why? If the influence has been limited, why has this been?

- Explore whether learning has been shared / disseminated and what the outcomes of this have been? Who has this been shared with? Probe as to whether this has been disseminated with procurement colleagues / colleagues outside of procurement / senior colleagues.

*Explore if and how learning has been taken forward and applied*

- What examples are there of how learning from the CIPS qualification and the management qualifications undertaken by Strand 3 beneficiaries has informed, influenced or impacted on individual practice and the organisation? Probe for concrete examples of changes made as a consequence of the training intervention. Possible prompts could be:

    – New relationships / methods used in managing suppliers / measuring their performance;

    – Contract development;

    – Management of risk.

For each example, discuss the following:
- The nature of the specific challenge or need that the individual or his/her organisation was facing

- How the interviewee has addressed or started to address the challenge – what has been the new approach or the shift in thinking?

- How did learning from the CIPS training contribute to the new approach or shift in thinking? What else helped?

- What has been the impact to date of the change (NB: Look for evidence or tangible detail to illustrate / explain the example)? Is there likely to be greater future impact.

- Explore what is anticipated in coming months in relation to progress with actions, further actions and expected outcomes.

- What has enabled the translation of learning from the programme into improved practice and what has acted as a barrier? Where this has not happened, explore issues of capacity and opportunity and support from line managers / other staff and organisational barriers.

- Explore if learning has affected role / job / pay?

*Impact of secondments*

**Explore what has been learnt**

- What have they learnt as a result of their secondment(s)? Explore in relation to specific procurement knowledge and other skills / competencies.   Given that learners may suggest that they have learned a large amount from their secondment, try and ask them to specify particular areas of learning / skills / knowledge.   Again, where interviewees have undertaken more than one secondment, please ask them to compare and contrast learning.

- If learning has been limited, please examine why this is the case.

- Explore whether learning has been shared / disseminated and what the outcomes of this have been?  Who has this been shared with?  Probe as to whether this has been disseminated to procurement colleagues / colleagues outside of this area / senior colleagues.

**Explore if and how learning has been taken forward and applied**

- What examples are there of how learning while on secondment has influenced or impacted on individual practice and the organisation / on future secondments? Probe for concrete examples of points of learning, and how this has been applied either to the project or to another area of procurement activity in the place they are working.  Possible prompts could be:

    – Skills acquired from working on projects during secondment;

    – Particular skills in relation to procurement (e.g. contracting, supplier management etc);

    – Generic skills / competencies (e.g. project management).

- For each example, discuss the following:

- The nature of the specific challenge or need that the individual or his/her organisation was facing

- How the interviewee has addressed or started to address the challenge – what has been the new approach or the shift in thinking?

- How did learning from the CIPS training contribute to the new approach or shift in thinking? What else helped?

- What has been the impact to date of the change (NB: Look for evidence or tangible detail to illustrate / explain the example)? Is there likely to be greater future impact.

- Explore what is anticipated in coming months in relation to progress with actions, further actions and expected outcomes.

- What has enabled the translation of learning from the programme into improved practice and what has acted as a barrier? Where this has not happened, explore issues of capacity and opportunity and support from line managers / other staff and organisational barriers.

*Any other comments (ask for Strands 2 and 3)*

- Are there any other comments on the role and value of the HGT programme?

- Are there any other suggested programme improvements that we have not already noted (for example, to the content, delivery mode, support provided)?

- Are there any other comments you would like to make?

**Interviews of line managers of Strands 2 and 3 beneficiaries**

*Introduction*

7.16 Begin by introducing the evaluation, explaining, as necessary that as the programme is at (approximately) its halfway stage, it was felt to be an appropriate time to assess its effectiveness to date, and possible way it might be improved. We are therefore keen to get the interviewee's perspective on the value and effectiveness of the training the person they line manage has received, especially in terms of how it has led to changes in the way they do their job 'on the ground' within their organisation.

7.17 Note that we are evaluating the programme not the performance of individual participants or organisations. Explain that comments are provided on an anonymous basis and the views provided by participants will be treated in confidence.

*Background and context*

*Understanding the interviewee*

7.18 As necessary/relevant, confirm or explore the following:

- The interviewee's role within the organisation (are they in a senior management role / procurement specific role)

- The interviewee's role in relation to the HGT programme. Explore whether they have played a role in:

  – Line management of secondees (Strand 3-specific) or the CIPS trainees in Strand 2.

  – Selecting / approving staff to go on the HGT programme.

  – Provision of formal / informal support and guidance – explore what systems are in place to follow up and support participants (supervisions, appraisal and mentoring).

- Explore the interviewees' awareness of the HGT programme. Examine whether they are familiar with:

  – The rationale for the programme;

  – The other strands of the programme;

  – Or just the strand in which their colleague / secondee is involved.

- Explore what they believe are the training needs of procurement specialists and to what extent they believe the programme is meeting these or not.

### *Views on the programme*

*Strand 2:*

7.19 Explore views on the programme:

- Explore the rationale for the participant going on the training, expectations of what they would gain from the course in relation to individual's job and the organisation's needs for procurement staff.

- Explore whether the expectations have been met in terms of increased / improved understanding and knowledge, attitude, skills and competences.

- Explore views on the relevance and applicability of the CIPS course for the beneficiary. Has the content and pitch of the course been appropriate to their current and expected day-to-day role?

- Explore views and experiences of any application and selection process with HHGT as a contractor.

- Explore views on teaching and support arrangements – delivery, the time required to participate.

- Explore how the course compares with their experience of any other training programmes aimed at procurement staff?

- What has worked well? What could be improved?

- Have there been specific gaps in knowledge or competence that have required additional focus or that the professional qualification has been less able to address? Please explain.

*Strand 3:*
7.20 Explore views on the programme:

- Explore the rationale for why the organisation bid to be involved in the HGT programme.

- Explore the rationale of the project that the secondee is involved in. What is the secondee's role on the project?  How well is the secondee able to perform the role expected?

- Explore views of how the secondment links with the training elements of the programme.  Prompt to cover the CIPS training as well as the more generic leadership and management training they are undertaking. What is their view on the appropriateness of this training mix for future procurement staff?

- Explore what support the secondee has received from the HGT programme while they have been on secondment.

***Outcomes***

*Strand 2 and 3:*

- What skills / knowledge improvements are evident as a result of the individual undertaking the CIPS training? Prompts:

  – New relationships / methods used in managing suppliers / measuring their performance;
  – Contract / specification development;
  – Management of risk.

- What has the individual done differently as a result of the training? Prompt for concrete examples.  What further actions are expected in the future? *Seek to corroborate the actions described by participants.*

- What has been the impact of any actions or changes implemented on the team or the organisation? Explore: Improved personal or team performance; improved efficiency, effectiveness and quality (resulting in improved procurement processes). Seek evidence underpinning views.

- What actions and impacts can be attributed to the course and which modules?

- Explore whether the course has had an impact on participants' commitment to CPD and their opportunities for career progression.

- Are the impacts greater or less than would have been expected from CPD / on the job training over the same period? Has it displaced other CPD or prevented others from doing CPD?  Seek explanation for their view.

- Explore whether knowledge and skills have been disseminated and shared with other people in the organisation.  If so, examine who this is: prompt for whether this is procurement specialists / non-procurement staff / senior staff.  If dissemination is limited, explore what the barriers have been.

- Are other procurement staff in the organisation likely to undertake their professional qualifications based on their colleagues having undertaken their professional training?

- Explore views on what the benefits have been for the organisation in terms of capacity by having more professionally qualified procurement staff? Has this had any impact / been noticed at the senior levels of the organisation? Has the profile of procurement changed as a result?

- Explore what other influences there have been on practice. To what extent has the previous experience of individual participants and current organisational context shaped their experience of the programme?

- What has enabled the translation of learning from the programme into improved practice and what has acted as a barrier?

*Final comments*

- Are there any other comments you would like to make?

**Survey for learners**

*Personal details*

1. **Name:**

2. **Name of employer:**

3. **Which part of the public sector do you work in?**

   – Central government department or agency;

   – Local government;

   – an NHS organisation;

   – another public service / quasi public sector body (e.g. police; fire services);

   – Other (please specify).

4. **Job title**

5. **Do you currently work in a specialist procurement role?**

6. **If not, what is your role?**

7. **If yes, what area of procurement?**

8. **Length of time in current role?**

   – 0 – 1 years;

   – 1 – 3 years;

   – 3 – 5 years;

   – 5+ years.

9. **Which age group are you in?**

   – 18 – 25

   – 26 – 34

   – 35 – 44

   – 45 – 54

   – 55 – 64

   – 65+

10. **Which of the following training courses did you attend?**

    – We have been provided with a full list.

*Quality and relevance of the training*

11. **Who made the decision for you to go on this course(s)?**

    – You

    – Your bosses

    – Someone else?  If so, please specify.

12. **If it was you that made the decision, why did you choose to do this course?**

    – Career advancement

    – Interest in the subject

    – Address a skills gap

– It is a mandatory area of training

**13.To what extent do you agree with the following statements (using Likert Scale which is a five point scale from 'Strongly disagree' through to 'Strongly agree'):**

The delivery of the training was:

– Flexible enough to fit with my professional commitments

– Carried out by high quality tutors

– Supported with high quality learning resources

– Provided in a location which was convenient to get to

– Provided in a location with sufficient and high quality equipment

**14.To what extent do you agree with the following statements (using Likert Scale which is a five point scale from 'Strongly disagree' through to 'Strongly agree'):**

The training:

– Is relevant to a challenge I face in my current role

– Addressed a skill / competency I did not have

– Filled a gap in my knowledge

– Will enable me to do an upcoming task with greater confidence

– Will enable me to complete a job I do with greater speed

– Will enable me to complete a job I do with greater accuracy

**15.How could this training be improved?**

OPEN RESPONSE

*What was learned and how was it applied*

**16.To what extent do you agree with the following statements (Likert Scale):**

Professional development – the training has:

– Improved my confidence in doing my job

– Made me more productive in the workplace

– Allowed me to expand my job role

Actions – the training has:

– Enabled me to take actions to improve procurement practices in my organisation

– Enabled me take actions to change supplier management procedures in my organisation

– Enabled me take actions to change the contracting procedures in my organisation.

– Expanded the role of procurement specialists in my organisation

**17. Please describe these actions**

OPEN QUESTION

*Equalities monitoring*

**18. Which of the following describe how you think of yourself?**

– Male

– Female

– Prefer not to say

**19. Do you consider yourself to be disabled?**

– Yes

– No

– Prefer not to say.

**20. What is your ethnic group?**

– White (Welsh; English; Scottish; Northern Irish; Irish; Gypsy or Irish Traveller)

– Mixed / Multiple ethnic groups (White and Black Caribbean; White and Black African White and Asian; Any other mixed/multiple background – please specify)

– Asian / Asian British (Indian; Pakistani; Bangladeshi; Chinese; Any other Asian background – please specify)

- Black / African / Caribbean / Black British (African; Caribbean; Any other black/African/Caribbean background – please specify)

- Other ethnic group (Arab; Any other ethnic group – please specify)

- Prefer not to say.

**21. What is your full time employment status?**

- In full time employment

- In part time employment

- On maternity leave

**Interviews with delivery agents**

*Introduction*

7.21 Begin by introducing the evaluation, explaining, as necessary that as the programme is at (approximately) its halfway stage, it was felt to be an appropriate time to assess its effectiveness to date, and possible ways it might be improved. The interview will focus on the management and delivery of the programme, what has worked well and what the main challenges have been.

7.22 Explain that comments are provided on an anonymous basis and the views provided by participants will be treated in confidence.

**Note for interviewer**:

Flexibility will be required in this topic guide as interviewees will be from a range of organisations, including those more focused on delivery, and those focused on programme management.

*Understanding the interviewee*

7.23 As necessary/relevant, confirm or explore the following:

- The interviewee's role and the organisation's role in the programme.

- The interviewee's role in relation to the HGT programme.

- For interviewee's involved in delivery, explore how and why they got involved?

*Rationale*

- Explore the interviewee's understanding of the rationale for this programme and whether they think that it has changed over the last 2 – 3 years.  What do they consider to be the main skills / workforce needs of the procurement profession in Wales?

- What are the most common skills gaps in the profession (as articulated by employers and learners)?

- *Delivery*

- Explore what courses the interviewee's organisation has been delivering?  Who decided what courses should be offered?

- Explore whether these courses were already in existence: who are they normally delivered to?

- Explore what the delivery model is for these courses: please cover: duration, location, distance learning, learning resources, assessment. Explore the rationale for this model (for some of the interviews – **PMMS**, for example – it is likely that the interviewee will be responsible for a number of courses).

- Has the delivery of the training changed?  If so, how has it changed, and why?

- Explore what the main learning outcomes of the courses are.   Explore the suitability of these learning outcomes to the key competency frameworks that relate to

- Explore whether they have faced any particular challenges so far?  If so describe, including their nature, implications and steps taken to mitigate against them.

- Explore whether are there any particular external factors which have affected delivery of the training?  If so describe.

- What have the participants' reactions been to the training they have received?  What data is the delivery agent collecting on learner satisfaction?  Is this available to the evaluation?

- What have employers' reactions been to the training their staff have received?

*Programme management*

- How did they get involved in the programme?  What bidding process did they go through?  Ask interviewees to reflect on this process and whether they could recommend any improvements.

- Explore interviewees' views on the management of the programme. What monitoring requirements are there? Is this an appropriate amount? What changes should be made to these requirements?  How often do you meet with the programme?

*Progress to date and outcomes*

- Explore with the interviewee, how delivery of their part of the programme is going?  What targets have been set by the programme management? How are these monitored?

- How effectively is the programme engaging and targeting the right participants?  How is responsibility for

- What have been the main challenges to date?  Have these been overcome?  If so, how?  What have been the main enabling factors?

What role has the HGT programme management played in helping to achieve targets / outcomes?

- Have any changes been made to the delivery model during the course of delivery?

- Explore the interviewees' views on the main outcomes for learners. Prompts including: addressing skills gaps?  Improving efficiency / effectiveness in the workplace?

- How could the programme / delivery model be improved?

**Interviews of grant recipient organisations**

*Introduction*

7.24 These interviews will be undertaken face-to-face as part of a case study visit to the organisations which have received funding through Strand 4 of the HGT programme.  It is likely that we will interview a few staff on these visits including more senior staff, consultants who have been delivering the project, and some of the existing staff at the organisation. Therefore the topic guide below is an overview of the sorts of questions to be asked in these interviews.

7.25 Interviewers will have access to background information in relation to the bid prior to the interview (for example, a business case).

*Understanding the interviewee, organisation and reasons for bidding*

- Explore the interviewee's role and organisation.

- Explore the organisation's procurement function: number of staff; position; skills needs; status (in relation to the Board, for example).

- Explore the organisation's involvement with the project: when and how did they first hear about the programme? When did they bid? What did they bid for?

- What was the rationale for the project? What did they hope to achieve?

  – Greater efficiencies?

  – More collaborative working?

- Explore the reasons for why the bid took place now: particular skill gaps; senior stakeholders in the organisation; links to strategic goals of the organisation; external drivers.

*Experience of bidding*

- Explore the interviewee's views of the bidding process: how time consuming was it? Were documents / bidding requirements clear?

- Did the HGT programme provide support when required?

- What more could the programme have done to support you?

- What did you learn from the process of bidding?

- How could the bidding process be improved?

*Experience so far*

- Ask interviewee to describe the implementation of their project to date.

  – What progress have they made to date? Are they on track?

  – What have been the main challenges in implementing the project?

  – What are the desired outcomes of the project?

- Ask interviewees to describe the support they have received from the programme so far. This might include direct funding, support from consultants, or other technical assistance.

- Explore the role of consultants / any other grant-funded inputs from the HGT programme: what value have they added? How have they supported the existing staff / team members?

- How has funding been used and what has it enabled the interviewee to do that they otherwise would not have?

- What other support would have been useful?

### *Achievements to date*

- If the project is at an advanced stage of implementation, explore what the impact of the project has been to date.  Prompts: impact on the procurement process; new skills for existing staff; new partnerships / collaborations between organisations; efficiencies in undertaking procurement exercises; impacts on the links with suppliers.

- If desired outcomes have not yet been achieved, explore why this is.  If it is a result of delays, prompt to understand what the problems have been, and how these have been / could be overcome.  Is there anything further that the HGT programme could contribute?

- If the project is still at an early stage of delivery, prompt to understand what the desired outcomes are; when these are likely to be achieved; and any potential issues there may be.

- Explore whether there have been any efforts to ensure there is a legacy.

### Interviews of stakeholders

### *Introduction*

7.26 Begin by introducing the evaluation, explaining, as necessary that as the programme is at (approximately) its halfway stage, it was felt to be an appropriate time to assess its effectiveness to date, and possible ways it might be improved. The interview will focus on the management and delivery of the programme, what has worked well and what the main challenges have been.

7.27 Explain that comments are provided on an anonymous basis and the views provided by participants will be treated in confidence.

## *Rationale and design of the programme*

- Explore the interviewee's understanding of the rationale for this programme. What do they consider to be the main skill / workforce needs of the procurement profession in Wales?

- How does the HGT programme fit with the wider strategic and policy agenda around procurement, and the training needs / skills gaps of the target group / participants?

- Explore whether and how the interviewee thinks the rationale has changed over the past 2 – 3 years (since the project was designed in 2009 – 10). Is the content / design of the programme still suitable? Is the target group still suitable?

- What other activities / initiatives / policies are there which seek to address the same / similar challenges to the HGT programme. Probe to cover, local / organisational initiatives; other regional / national initiatives (and anything covering the rest of the UK); initiatives covering particular parts of the public sector (for example, the NHS).

- How does the HGT programme fit with / complement / detract from these initiatives?

- Explore the interviewee's views on the design of the programme: are there any gaps? What is the reason for these gaps? Are they a result of new / greater challenges? How should the programme adjust its content and targets?

- If interviewee has knowledge of the detail of the training courses delivered under this programme, examine whether they think this is a suitable set of training: examine fit to rationale; whether there are any

gaps; whether some training courses should be given greater / lesser focus?

***Delivery and progress to date***

- Explore the interviewee's knowledge of the management of the programme to date. What have been the main strengths / weaknesses of the approach taken by programme management? Should this be adjusted for the remainder of the programme? How well do you consider that each Strand has been managed?

- How well do you consider that the programme has undertaken commissioning, monitoring and management of suppliers?

- Explore what the interviewee thinks has been the main challenges to date.

- Explore the interviewee's views on progress and successes so far in terms of:

  - reaching target outputs;

  - engaging with target beneficiaries;

  - learners achieving the main learning outcomes;

  - supporting public sector organisations to utilise e-procurement solutions;

  - supporting public sector organisations to utilise collaborative purchasing activities;

  - supporting public sector organisations to utilise new approaches to purchasing;

  - supporting public sector organisations to attract SMEs;

  - supporting public sector organisations to undertake sustainable and bulk purchasing.

*Future of the programme*

- Explore with the interviewee how they think the programme should develop over the remaining 2 – 3 years. Explore in terms of programme management and the delivery of Strands 2 – 4.

**Interviews of non-participating organisations**

*Introduction*

7.28 Begin by introducing the evaluation, explaining, as necessary that as the programme is at (approximately) its halfway stage, it was felt to be an appropriate time to assess its effectiveness to date, and possible ways it might be improved. It may be necessary to explain what the programme is – we will aim to speak to someone who is aware of the HGT programme but if not, the interviewer will have to provide some contextual information.

7.29 Explain that comments are provided on an anonymous basis and the views provided by participants will be treated in confidence.

*Understanding the interviewee, organisation and procurement function*

- Explore the interviewee's role and organisation.

- Explore the organisation's procurement function: number of staff, position, skills needs; status (in relation to the Board, for example).

*Awareness of the HGT programme*

- Explore the interviewee's awareness of the HGT programme: have they considered bidding for funding / putting staff on HGT training / hosting a secondment? If not, why have they decided not to take part in this programme?

*Current needs*

- Explore what training / staff development activities are in place for these staff. Prompts include: mandatory training; short courses focussed on particular skill / knowledge gaps; internal training; CIPS qualifications.

- How well does this meet the organisation's needs? Prompt to check it is of a sufficient quality, flexibility. How much training of this sort is available? Who are the main providers?

- What other training would be helpful? Prompt to assess whether their priorities are for training (and if so what sort of training would be helpful – include subject area; length of course; provider etc); financial / consultancy support for investment in e-procurement solutions.

- What other steps are you taking to improve procurement practices in your organisations? Prompts include: investing in technology; developing new partnerships / collaborations with other public sector bodies; re-structuring the team internally; recruiting new procurement staff.