

PROCUREMENT SKILLS AUDIT: QUESTIONNAIRE

Guidance Notes

The purpose of this Procurement Skills Audit is to determine the extent to which each officer within the Council that is involved with procurement (e.g. dealing with suppliers and contractors, requesting quotations or tenders, issuing orders & processing invoices for the purchase of goods works or services) has the required skills to fulfil the requirements of their job. The main purpose of the audit is to identify and implement a suitable training programme for the officers involved.

A 'Procurement Skills Assessment Form' should be completed by the individual concerned, ideally as part of any performance appraisal process that is currently in place within the department. The Form should be signed by the officer and their line manager when completed.

To complete the Form, first refer to the 'Procurement: Required Skills / Competency Levels' in order to determine the position of the person being assessed (i.e. Officer, Senior Officer, Principal Officer, Purchasing Professional). During the process it is important to bear in mind the 'general skill level required' in order to make the assessment as relevant and as beneficial as possible.

i.e.

- Officer
 - ✓ A basic awareness of the key issues involved with each topic that is relevant to the job requirements. Knowledge of where to seek advice/more detail if required.
- Senior Officer
 - ✓ An understanding of the key issues for each topic and their implications for the Council. Able to ask relevant and constructive questions on the topic.
- Principal Officer
 - ✓ Detailed knowledge of the topic and capable of providing guidance and advice.
- Purchasing Professional
 - ✓ Extensive and substantial practical experience and applied knowledge on the topic.

For each section read through the various topics involved and consider the corresponding requirements. Bearing the responsibilities and functions associated with the job, briefly record comments regarding the actual skills of the post holder and areas where training and/or assistance is considered beneficial. An example of how a completed Form would look is attached to help you through this process.

When completed the form should be returned to

PROCUREMENT SKILLS ASSESSMENT FORM: EXAMPLE

NAME:	POSITION: Senior Officer DEPARTMENT:	DATE:
TOPIC	COMMENTS RE ACTUAL SKILLS	TRAINING REQUIREMENTS
1. Strategic context 1a. Policy & regulatory Framework	<i>Generally aware of strategic context for procurement and detailed knowledge of pre-defined rules. However, not 'up to speed' with latest EC procurement rules.</i>	<i>EC procurement rules</i>
1. Strategic context 1b. Strategic Awareness	<i>Awareness of strategic issues, and ability to identify circumstances where value and risk require a strategic approach to be taken.</i>	<i>None</i>
1. Strategic Context 1c. Corporate Arrangements	<i>Commercially focused and aware of corporate procurement arrangements.</i>	<i>None</i>
2. Managing the Procurement Process	<i>Good awareness of markets and considerable experience of applying basic procurement processes to relatively high value contracts. Would like update of latest thinking on framework agreements though.</i>	<i>Framework agreements</i>

TOPIC	COMMENTS RE ACTUAL SKILLS	TRAINING REQUIREMENTS
3. Managing Contracts & Supplier Relationships	<i>Feels comfortable in being able to manage suppliers and contractors.</i>	<i>None</i>
4. Project and Programme Management	<i>Has basic understanding of project management, but would like to hear latest thinking on risk management</i>	<i>Risk management</i>
5. Procurement Tools & Techniques	<i>Considered to have little, but sufficient knowledge of basic tools and techniques. Knows when to ask for specialist advice</i>	<i>None</i>
6. Construction & Engineering Projects	<i>Aware of all the key issues in construction and understands the pre-determined rules in place within the Council. Has experience of applying basic procurement processes to several construction projects.</i>	<i>None.</i>

TOPIC	COMMENTS RE ACTUAL SKILLS	TRAINING REQUIREMENTS
7. ICT Projects	<i>Not applicable to post.</i>	<i>None</i>
8. Public-Private Partnership Projects	<i>While not currently applicable to post, I would like to find out more about strategic partnering arrangements to see if they could be of benefit in my area.</i>	<i>Overview of Strategic Partnering arrangements</i>
9. Other Spend Categories and Services	<i>Understands key issues in sector relevant to job and able to apply basic procurement processes.</i>	<i>None</i>
10. Self Management	<i>Good planning and time management skills.</i>	<i>None</i>

TOPIC	COMMENTS RE ACTUAL SKILLS	TRAINING REQUIREMENTS
11. Team Management	<i>A good team player, but often felt let down by others.</i>	<i>None</i>

General Comments

Signed
Officer

Date

Signed
Line Manager

Date