

Procura+ Case Study

Creating Guidance and Templates for Market Engagement in Cornwall

Engaging throughout the procurement cycle



Image: pixabay.com

Procura+ Participant: Cornwall Council

Policy/approach: Creating a robust approach to engaging the market throughout the commissioning and procurement cycle

Targets/aims: Increase understanding of a range of market engagement techniques across Cornwall Council.

SUMMARY

- Suppliers are crucial partners in the procurement of sustainable goods and services.
- To procure effectively, procurement officers need to understand the market.
- Market engagement requires an investment of time and resources, thus to be effective, the right technique at the right time for the right products must be selected.
- Cornwall Council created a list of criteria and comprehensive guidance on engagement techniques to inform selection of appropriate methods.
- Effective market engagement has led to better informed specifications, contracts and ultimately delivery.

Background

Cornwall forms the westernmost part of the south-west peninsula of the island of Great Britain, with a population of 536,000.

In 2014, [Cornwall Council](#) developed a [Responsible Procurement Policy](#) which outlines its commitments to ethical sourcing, environmental sustainability and carbon management. This is supported by various resources, including a practical checklist for all contracts over £50,000 (approximately €58,000).

During the creation of this policy, Cornwall Council recognised that suppliers are crucial partners in the procurement of sustainable goods and services. Realising policy goals can often be limited by the size and ability of the market, Cornwall developed [Guidance for Suppliers](#) alongside the new policy, in order to prepare the market for the Council's responsible procurement priorities. In addition, the Council has been running a [Supply Chain Development Programme](#), which makes use of webinar software to provide potential suppliers with information about the tender process.

Building on this work, Cornwall has most recently turned its attention to improving communication between the Council and the market. This work aims to increase understanding in the market of the Council's needs, and increase the Council's understanding of what the market is able to provide.

A range of market engagement techniques exist which are appropriate at different times in the commissioning and procurement cycle. Additionally, not every technique will be appropriate for every contract, depending on the value, risk, complexity and level of innovation.

As market engagement requires an investment of time and resources, selecting the right means of engagement, at the right time and for the right contract is thus essential to ensure that investment in resources for engagement activities pays off.

Development of the approach

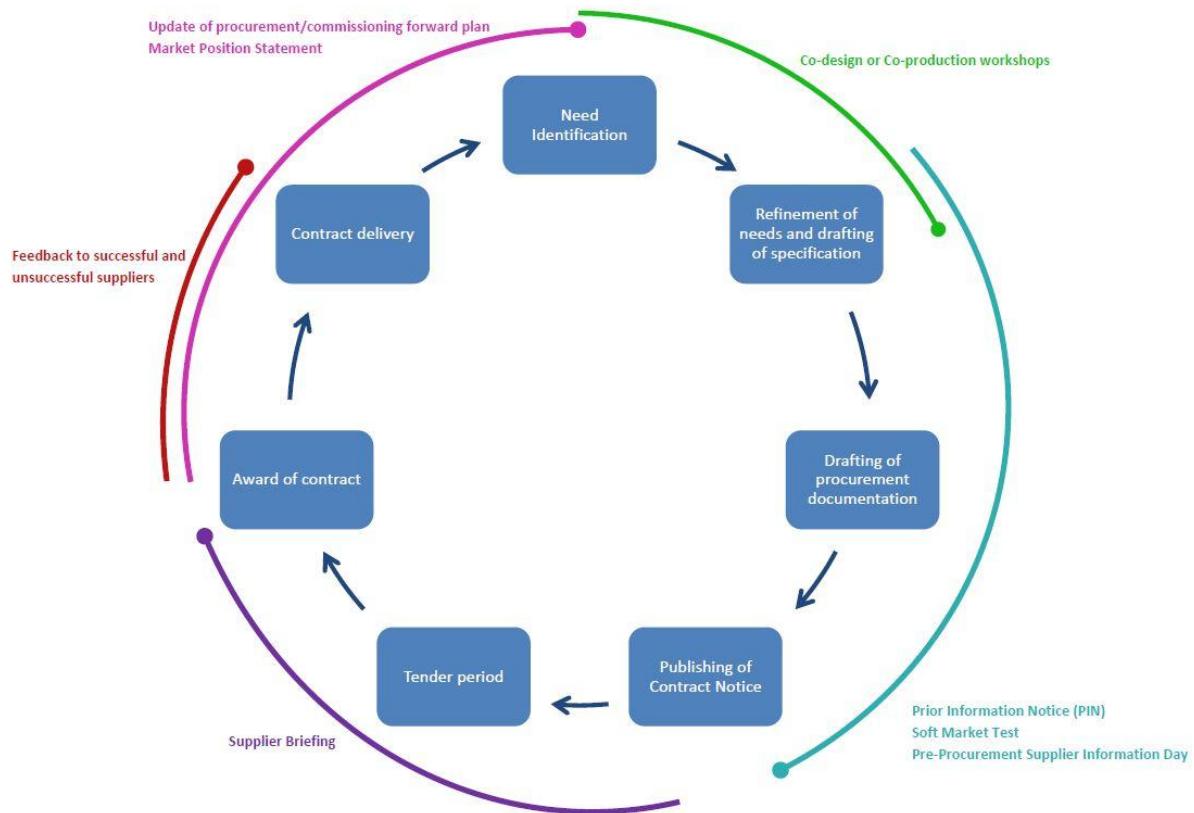
In 2016, Cornwall Council launched a project which specifically focused on improving knowledge of and confidence around using market engagement techniques throughout the commissioning and procurement cycle.

This project was led on by the Council's centralised Commercial Team in consultation with commissioners and contract managers across the organisation. The Council also sought to understand from suppliers what they valued in the market engagement process through an online survey. The market engagement approach, associated guidance and templates form part of the Council's Supply Chain Development Programme which has executive sponsorship from the Commercial Service Director.

Historically, the Council has carried out market engagement on a number of larger, more complex contracts but with no level of consistency or shared learning.

One of the most important elements of the development was ensuring roles and responsibilities in the market engagement process were clearly understood across different stakeholders in the commissioning and procurement process.

Another key element was the identification of appropriate timings for the different market engagement activities. To assist with this objective an engagement diagram was co-designed with colleagues across the Commercial Team, Commissioning Teams and Contract Management Teams. This diagram is shown below.



One of the premises of this approach was that with the appropriate support, market engagement activities need not be overly resource intensive. If detailed guidance documents with supporting templates were provided to Commissioning and Commercial staff, risks could be minimised and maximum value gained from effective market engagement.

Implementation of the approach

Although it is the Council's intention to build on this initial implementation, the following Guidance Documents and Templates have now been launched:

- Pre-procurement Supplier Information Day Guidance
- Pre-procurement Supplier Information Day Invite Template
- Pre-procurement Supplier Information Day Presentation Template
- Soft Market Test Guidance
- Soft Market Test Online Template (Netigate online survey platform)
- Soft Market Test Word Template



When the guidance was implemented, it was supported by a communications campaign which involved promoting the new approach to officers involved in Commissioning and Procurement across the organisation. New Intranet pages were launched to explain the benefits of the new approach and individual market engagement activities.

To support officers who were nervous in conducting market engagement the Commercial Team are now offering a full day of training once every two months which build on the guidance documents. This “Engaging with your market” training has been well received by the organisation and attendance is building over time.

Following the implementation it became quickly apparent that businesses wanted to take part in market engagement activity but didn’t really know what to expect. To set clear expectations the Council launched a [new webpage](#) explaining how market engagement works, what the Council can and cannot do and the benefits to businesses in taking part.

Overall the new guidance and templates have been very well received across the organisation. Feedback from businesses at market engagement events has also been very positive. In general, potential suppliers welcome the opportunity to open lines of communication with Commissioners and Procurement Officers, doing this in an open, transparent and fair way is vital to minimising and associated risk.

Results

A key outcome of the revised approach is that Market Engagement activity at Cornwall Council is now more proportionate to the value gained from the activity. The guidance asks officers to consider a few key questions to decide whether Market Engagement will be a worthwhile activity for them:

- How complex is the product/service?
- How complex is the market?
- How mature is the market?
- What is the scope for innovation?
- What is the scope for delivering policy through procurement objectives (e.g. Social Value)?
- What is the value of the contract?
- What is the balance of knowledge between buyer and supplier?

The answers to these questions are then used to guide the officer to the correct, if any, market engagement activities. The individual guidance documents and templates then help to ensure a level of consistency in the delivery of market engagement activities which has been welcomed by both Council staff and businesses.

Lessons learned

1. Don’t be scared off by the perceived risks associated with market engagement, just actively manage them, as they are far outweighed by the benefits.
2. Bring procurement officers, commissioners and contract managers along on the journey, co-designing resources will increase their ownership over the market engagement activity moving forward.
3. Provide guidance to suppliers on what to expect from the market engagement activity, set their expectations early to avoid any potential issues later down the line.

4. Be transparent! When you are conducting any market engagement activities share everything that you can. If you can video a market engagement event and share it online afterwards then that is perfect.

CONTACT

David Morgan

Senior Commercial Services Specialist

dmorgan@cornwall.gov.uk

Procura+ Participant page - <http://www.procuraplus.org/participants/public-authorities/cornwall/>

Website - <http://www.cornwall.gov.uk/responsibleprocurement>

About Procura+

Initiated and co-ordinated by ICLEI, Procura+ is a network of European public authorities and regions that connect, exchange and act on sustainable and innovation procurement.

Connect.



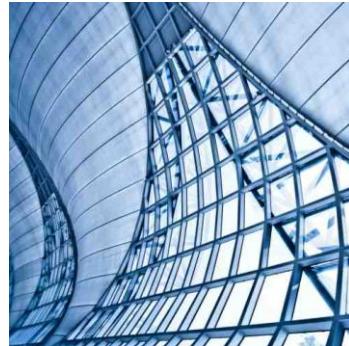
We are a network of European public authorities that connect, exchange and act on sustainable and innovation procurement.

Exchange.



Our combined knowledge and experience allows us to provide advice, support and publicity to any public authority that wants to implement sustainable and innovation procurement.

Act.



The Procura+ Network joins forces to champion sustainable and innovation procurement at the European level.

www.procuraplus.org



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