



Spelthorne Borough Council Procurement Policies & Procedures

02_Developing the Procurement Plan

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1. Introduction

This procedure outlines the process for developing a plan for procurement activity across the Council. It outlines the importance of securing procurement project budgets; of planning any proposed procurement activities in good time; of involving the Corporate Procurement team (when required) as early as possible for any large, high value, strategic and / or complex procurements; and planning the re-tender of existing contracts in sufficient time to ensure business continuity.

A procurement project is any project which entails the acquisition of goods, works and services from an external third party (supplier).

Procurement projects, depending on their value, require support from Corporate Procurement and / or Legal Services. See below for further details.

2. Purpose

Except where Contract Standing Orders (CSOs) require support from Corporate Procurement and / or Legal Services¹, the responsibility for procuring works, goods and services is devolved across the Council. Officers are responsible for ensuring that they carry out a compliant procurement project and achieving value for money, by following the Procurement Policy and various Procurement Procedures, as applicable.

For those projects which require Corporate Procurement support, as much notice as possible needs to be given to ensure adequate time to tender and provide end to end support. It also allows sufficient time to understand the market, in order to achieve best, whole life value for money.

¹ CSOs state that all projects above £30,000, and those where the opportunity is to be advertised, require support from the Procurement team.

3. Considering and Budgeting for Procurements and Contracts

Council teams need to undertake their financial and budget planning well in advance of the coming financial year, to align with the budget setting process, and ensure that any Growth Bid applications are duly considered.

Appendix A (Budgeting & Planning of Contracts & Procurement Projects) details a proposed timetable and process for this.

Procurement Board will liaise with Group Heads and their Managers in the early autumn to understand:

- arrangements required to renew expiring contracts, if required;
- proposals for the procurement of any new requirements and contracts, including any changes to the specification of requirements;
- exit strategies for expiring major contracts, especially where this may have a financial impact.

This discussion will help teams in the development of their Service Plans and will ensure that they have approved budgets for any continuing contracts and any new planned procurements they wish to undertake in the next financial year.

The Corporate Procurement Team will consult with other Surrey councils (via the Surrey Procurement Group) to explore opportunities for carrying out joint procurements, in order to achieve economies of scale and greater value for money.

Any large unplanned projects (that could reasonably have been foreseen) may risk delay if the Corporate Procurement is unable to provide support within the required timescales, and if further budget approval – in year – needs to be sought.

Appendix B has a draft of the form to be used for the Procurement & Contracts discussion.

Once discussions have taken place with all teams across the Council, the draft Procurement Plan, with all procurement and contract intentions will be prepared and considered by the Procurement Board. This early indication of potential projects will enable the Procurement Team to plan and adequately resource all projects in the most appropriate timescales, allowing contract continuity and market engagement where required.

Appendix C details the process for the drafting of project requirements, the approval process, and the methods by which the Authority will develop and approve its procurement plan for the coming financial year.

The process detailed at section 3 assumes that Council services engage positively with Corporate Procurement and share their budgets and intentions in a timely and co-operative manner.

4. Procurement Project Savings and Social Value

The early agreement of project and contract budgets and the Procurement project plan provides much greater opportunities for market management, which in turn will give greater opportunities

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for achieving procurement efficiencies and cashable savings. As a general rule, new procurement projects should aim to achieve a 10% saving against the agreed budget.

Early project planning also provides improved opportunities for the achievement of social value benefits. In larger tenders, social value must be weighted as a minimum of 10% of the total evaluation score and should aim to achieve £1 of social value for every £100 of project cost.

Appendix A – Budgeting and Planning of Contracts and Procurement Projects

Timing	Activity	Responsibility	
August / September	<p>Procurement team contracts Council Teams asking them to review their current contracts and consider any new requirements that they may need with a view to procuring within the next financial year.</p> <p>Some support may be required from the Procurement Team to undertake some initial market sounding to inform cost and procurement approach to be taken.</p>	Group Heads and Team Managers	
August / September	Set up meeting to discuss requirements	Procurement team	
September / October	Joint meeting between Procurement and Council Teams	Group Heads, Team Managers and Procurement Teams	
October	Draft Procurement Plan for following year is put together, and provided to MAT for information and sign off (NB this is not budgetary approval)	Procurement Team	
November - February	Teams put together their budgets, including any requests for anticipated procurement and contracts (Growth Bids)	Group Heads and Team Managers	
November - February	MAT and peer review of requests for budget / Growth Bids	MAT+	
February / March	Team budgets agreed, including the scope and cost of any planned procurements and contracts	MAT, Full Council	
March	Procurement Plan finalised based on agreed project budgets	Procurement Teams	

Appendix B - Procurement & Contracts Review Meeting Template

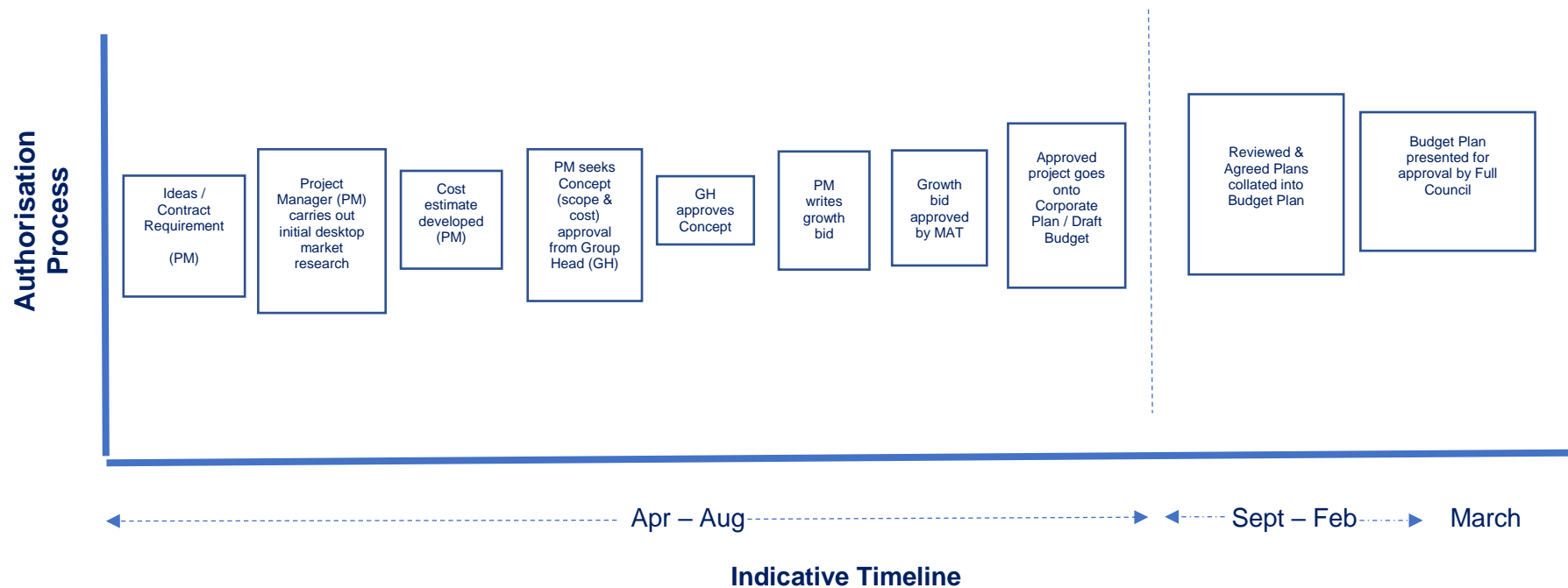
Procurement & Contracts Review Meeting							
Team				Group Head			
Meeting attendees				Managers			
Details of Existing Contracts							
Contract Name	Supplier	Contract Start Date	Contract End Date	Options for Extension	Are extensions to be used?	Annual Value	Total Contract Value
Details of new Requirements							
Requirement	Estimated Cost	Requirement start date	Growth Bid agreed?	Project Manager	Contract Duration	Annual Contract Value	Total Contract Value
Details of Contract Extensions and / or Variations							

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Appendix C - Approval Process for new (non-urgent)² Procurement Projects



² Projects which are planned and can wait for the new financial year planning cycle