

Appendix 1 - PA 23 Implementation Action Plan.

Action Required	Department	Responsible officer/s	Others involved	Sign off requirements	Start Date	Est. End Date	Status update	Completed
Commercial Activity								
Ensure pipeline document is up to date and holds details of all current and upcoming procurement projects	Procurement	Accountant Asst/Procurement Officer	All contract managers and procurement leads, to ensure the pipeline is up to date and all future projects are communicated to the procurement officer as soon as they are known.	Operations Accountant	Ongoing	Ongoing	Procurement regularly update the pipeline and contract register, this is circulated to CMT quarterly and Procurement request this is reviewed and updates or amendments notified to them if required. All new contracts are added to the pipeline that procurement are involved in or made aware off. Future procurement projects when communicated to Procurement are updated on the pipeline. The pipeline is reviewed and discussed with budget holders at budget monitoring meetings with their accountants.	
Review TBC's pipeline and review when contracts are due to end, or due to be retendered. Look closely at the planned procurement activities tabled for 2025 and consider the impact of PA 23 and discuss with the lead officers.	Procurement	Procurement Officer	All contract managers and procurement leads, to ensure the pipeline is up to date and all future projects are communicated to the procurement officer as soon as they are known.	Operations Accountant	01/04/2024	Ongoing until implementation	This work is underway and will continue until implementation. Procurement Officer to email relevant officers again to advise them to start any big projects if possible before implementation date or consider if PA23 is a more favourable option. This was already actioned previously when implementation date was Oct 24. To discuss during training on PA23 due to take place Nov/Dec 24.	
Make a list of any upcoming complex procurements and discuss with lead officers the best procurement route. Consider would a complex procurement you have planned potentially give you a better service using the new Competitive Flexible procurement procedure or would PCR15 be the most advantageous route if it can be started before 24/02/25	Procurement	Procurement Officer	All contract managers and procurement leads, to ensure the pipeline is up to date and all future projects are communicated to the procurement officer as soon as they are known.	Operations Accountant	Nov-24	31/12/2024	Pipeline to be reviewed by the Procurement Officer and meetings made with relevant officers if any projects are identified over threshold.	Completed - no contracts identified.
Standard Operating Procedures & Policies								
Identify your current Procedures, Polices and associated documents.	Procurement	Procurement Officer		Operations Accountant	01/04/2024	31/01/2025	Procurement have started to review current documents, and will be populating them into a Procedure, Process and Policy register to record all documents retained, who is responsible for them, and when they were last reviewed, circulated or uploaded to info zone or TBC website. This will then be reviewed on an annual basis once in place	
Review your current SOPs and other associated documents against information you have read about the Procurement Bill	Procurement	Procurement Officer		Operations Accountant	01/04/2024	ongoing	Procurement Officer has updated the majority of the procurement docs in preparation for PA23, these will be revisited in light of any new information or guidance received before Feb 25 and updates recorded on the procurement document register.	

Update Financial Regulations & Procurement Documents inline with PA23	Finance	Procurement Officer & Operations Accountant	Executive Dir Finance, CMT & Audit & Governance Committee	CMT & Audit & Governance	01/05/2024	01/03/2025	Procurement officer has reviewed and updated the financial regulations, these were due to go to A&G in November 2024, they will now need to be revisited in light of the delay and new information that is still forthcoming. Operations Accountant & Procurement Officer to review then planned to go to CMT & A&G in quarter 4 if PA23 start date is not pushed back further.	
Complete National Procurement Strategy toolkit.	Procurement	Procurement Officer & Operations Accountant	CMT, Vol Sector Lead Officers		Oct-24	Oct-24	Toolkit reviewed by Procurement Officer & Operations Accountant and outcomes recorded and shared with Corporate Project Co-ord. Main areas of weakness or development identified and included in procurement strategy action plan.	Completed
Procurement Strategy reviewed and agreed	Procurement	Procurement Officer & Operations Accountant	Head of Finance & S151 Officer	CMT & Audit & Governance	01/04/2024	31/01/2025	Draft Procurement Strategy circulated to CMT November 2024 for comments. Approved by CMT. Circulated to Cabinet Jan 25.	
Communicate document and process changes to end users and explain reason for changes	Procurement	Procurement Officer & Operations Accountant	CMT, HOS		01/01/2024	Ongoing until implementation	PA 23 communicated to CMT & HOS via procurement quarterly reporting and CIPFA workshop, this should be communicated to relevant officers in HOS team meetings. Training to be provided by Procurement Officer Nov/Dec and Jan 25 for those that expressed an interest. Comms to be circulated when new updates are all uploaded onto Info zone and TBC website. Relevant officers to complete knowledge drops. Cabinet Report produced.	
Ensure all out of date information is replaced with new Procedures and Policies	Procurement	Procurement Officer & Operations Accountant			01/04/2024	Ongoing until implementation	Document register once created will support and evidence this.	
Guidance and Information								
Identify current guidance and information that is available, where it is stored, what is it used for and the intended audience. Review current guidance and create a guidance asset register.	Procurement	Procurement Officer		Operations Accountant	01/04/2024	31/01/2025	Procurement have started to review current documents, and will be populating them into a Procedure, Process and Policy register to record all documents retained, who is responsible for them, and when they were last reviewed, circulated or uploaded to info zone or TBC website. This will then be reviewed on an annual basis once in place	
Establish what guidance you may need to develop to help stakeholders understand the new regime. Identify where language needs to be changed in existing documents and identify any gaps in your guidance, and therefore any new documents that are required for PA 23	Procurement	Procurement Officer		Operations Accountant	01/04/2024	31/01/2025	Comms uploaded onto TBC website for suppliers. Procurement docs have been reviewed and updated but will need to be revisited as and when guidance is updated.	
Communicate changes to guidance and information. Make guidance and support easily accessible.	Procurement	Procurement Officer	Web updates	Operations Accountant	01/04/2024	24/02/2025	All updates will be communicated once finalised and uploaded.	
Set up a Procurement page on TBC website to share Procurement Strategy, Pipeline, Social Value Policy and Transparency information	Procurement	Procurement Officer	Web updates	CMT	01/10/2024	31/01/2025	Once agreed these documents will be added to the TBC Procurement web page.	
Review the Council's Terms and Conditions and Information to Tender.	Legal	SCC Legal Team	Procurement Officer & Operations Accountant	Executive Dir Finance	31/01/2025	24/02/2025	Procurement have discussed the requirements with SS legal team and they have advised they will have capacity to complete this in January 2025.	

Systems								
Register with new procurement portal when available and communicate this to suppliers	Procurement	Procurement Officer	Gov.uk	Operations Accountant		24/02/2025	Will action as soon as this is available, this requirement has been communicated to suppliers via our website	
Understand the impact the new regime will have on your systems.	Procurement	Procurement Officer & Operations Accountant	Intend relationship manager,		01/08/2024	31/01/2025	Procurement Officer & Operations Accountant met with intend to discuss the system. Intend confirmed the system would do everything we need it to after implementation of PA23 regarding notices. Procurement Officer to arrange further meeting to demo current pages and ensure we have the relevant upgrades required. Intend's Relationship Manager has provided quotes for additional Intend software available which is costly. Procurement need to ensure if we do not invest that intend will do what is required regarding notices etc. Further investigation required	
Collaborate with subject matter experts and your third party systems providers, to gain a better understanding of the systems used in your organisation and how they work together	Procurement	Procurement Officer & Operations Accountant	IT Department, Intend relationship manager,		01/08/2024	31/01/2025	Further investigation required after initial meeting. Meeting with Intend Qtr. 4 to provide upgrades and a system check.	
Understand how changes in your systems may impact users and any accessibility requirements and cost implications	Procurement	Procurement Officer & Operations Accountant	IT Department, Intend relationship manager,		01/08/2024	31/01/2025	Further investigation required after initial meeting. Meeting with Intend Qtr. 4 to provide upgrades and a system check.	
People								
Identify relevant staff who will need to be trained in the new regime and to what level of expertise	Procurement	Procurement Officer & Operations Accountant	CMT, HOS, Contract Manager, Procurement Leads		Aug-24	31/10/2024	Procurement Officer circulated an email offering training on PA23, response was good but not from all departments. Those departments that have not responded will be chased again. Training planned for Nov/Dec 24 & Jan 25 for those that have requested it. CMT and HOS also asked as per the quarterly report to identify training needs and advise the Procurement Officer. HR also contacted, the 4 officers that identified procurement as a training need have been included in training.	Completed
In house training adapted to suit the requirements of the relevant contract managers and lead officer's	Procurement	Procurement Officer & Operations Accountant			01/08/2024	31/12/2024	Training notes and presentation completed by Procurement Officer and tested on one department. This will be rolled out to all officers that signed up for training during Nov and Dec 24.	Completed
Officers involved in Procurement to complete online training & knowledge drops.	Procurement	Procurement Officer & Operations Accountant			01/04/2024	28/02/2025	This will be signposted during training and has been communicated and links provided to CMT & HOS via the quarterly reports.	
Provide external workshop for CMT	Procurement	Procurement Officer & Operations Accountant	CIPFA		Sep-24	Sep-24	Completed	Completed

Continued development of the Procurement Officer	Procurement	Procurement Officer			01/01/2024	ongoing	Procurement Officer has completed numerous webinars on PA23 and will continue these (normally come out every 2 weeks), attended the CIPFA Leadership Workshop, reviewed all of the Knowledge Drops, regularly keeps up to date with news letters from intend and CIPFA. Completed and passed the TPP certification model (from the government commercial function). specific for PA23 (9 modules completed and exam passed). CIPFA drafting competitive flex training attended.	
Contract Management Training	Procurement	Procurement Officer & Operations Accountant			01/07/2024	28/02/2025	PowerPoint presentation completed by Operations Accountant and Procurement Officer Looking to roll this out Feb/March 25.	
Communication with suppliers	Procurement	Procurement Officer & Operations Accountant		CMT	01/07/2024	Ongoing	Comms agreed by CMT as part of the quarter 2 reporting, these have been uploaded to the TBC website. Once the gov portal is available guidance on registering will be provided to suppliers. Guidance on how to register for Intend have also been added to the TBC website.	