

# Case Study: The Moray Council



Scottish public sector spending on works, goods and services has reached in excess of £10 billion a year.

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The Scottish Government has made considerable progress over the last few years to address some of the most common issues facing buyers and suppliers in public procurement. This is directly linked to the strategic outcome of a wealthier and fairer Scotland. One of the main focuses has been to address the issues of duplication, disproportionality and lack of consistency during the selection phase of the procurement process. As a result of this work, a cross-sectoral team of buyers appointed BravoSolution to create, deliver and implement a web-based SaaS procurement process management system.

Using the resulting PCS-Tender solution would mean that buyers and evaluators could work collaboratively and purchase goods, works and services in line with the Procurement Journey best practice guidelines. It would give suppliers a consistent, single approach to public sector tendering and allow those bidding for public contracts with the ability to store, edit and re-use answers and information they have stored against standard questions. The system was made available to all public bodies, along with support and training for those wishing to adopt it. One of the local authorities to grasp this opportunity was **Moray Council**.

**Challenge: Using PCS-Tender to build on the “centralised procurement operation” to achieve a fully transparent and collaborative working model.**

Moray Council is committed to delivering high-quality, cost-effective services to the Moray community and taxpayer. Like all councils, it has been facing a challenging financial situation. 12 months ago, it took the decision to fully adopt PCS-Tender (which links to PCS- Advertising portal) to support it in spending public money more effectively, bring full transparency of the end-to-end internal procurement process and to ensure a fair, visible and less complex process for suppliers.

The overall transformation began in 2009 and has taken some time, but the organisation is now realising what promises to be long-term benefits. Diane Beattie, Payments Manager at Moray Council, is responsible for all financial processes across the organisation, including procurement. She explains the business driver behind the decision, “Moray operates a hybrid procurement model. We have a corporate procurement team of procurement and contract officers who offer central support and guidance to the departments, but it is the Lead Procurers in the departments who have ownership of the procurement activities. While we did have a joined-up procurement process, what we lacked was an end-to-end partnership process that provided full transparency. We needed to be able to support the work undertaken at the front-end of the process and build on that knowledge with the departments to achieve a fully collaborative working model.”



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“Generally, local authorities are not over-resourced, so it makes sense to take a centrally funded and world class solution and make your processes work around it. As an early adopter of PCS-Advertising it made sense to capitalise on system developments and explore the potential of PCS-Tender. We underwent a full procurement transformation with PCS-Tender, July 2013 it was a huge learning curve, but we have embraced it completely. It is flexible enough to cope equally well with complex tenders like large civil engineering projects, and lower tenders like small software requirements. All procurements require the same considerations if you want the right outcomes, it’s just a question of degree, and so we use it for all tenders regardless of size. 12 months later, we have successfully managed 62 projects through it.

“The benefits we are seeing coming out the other end are immense. We have achieved the transparency we hoped for and far more besides.”



**Using PCS-Tender brought tighter control over the whole procurement process**

Tricia Herley is Assistant Manager of the corporate procurement team.

“As a team, we were keen to learn and use PCS-Tender because we wanted to have a less disjointed and faster procurement process. We were able to identify the efficiencies that could come from this transformation and saw PCS-Tender as an opportunity to streamline and enhance our approach and provide an effective procurement function to the departments and ultimately the council.”

Prior to implementing PCS-Tender, procurement activities, were in the main, carried out by the individual departments. “Our Lead Procurers in the departments would write the specifications, advertise the tender and invite suppliers using PCS-Advertising. Although communication could be done electronically through that system, they would then have to carry out the evaluation on paper in their own files, only publishing the results on the system.” The process had not really changed in years, apart from the electronic communication, and still involved considerable manual effort that was unsustainable, undesirable and uneconomical for the council and the procurement team.

PCS-Tender has automated the process and brought greater visibility while enabling procurement to retain its part-devolved, part-centralised model. “It works well,” continued Tricia, “because the departments still have control of the specification, the timing of the tender in terms of when it will go out, and the choice of evaluation panel, but the corporate procurement team can support the entire process. Every tender now comes under us, we can review and sanity-check all the information and where necessary challenge the input from a corporate perspective. As all this happens in PCS-Tender, it has effectively given us a two-way exchange for every tender, and now the standard of information going out, like terms and conditions or instructions, is raised.”



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Diane explains:

“PCS-Tender has allowed us to take the administrative process completely off the shoulders of the Lead Procurers and project-manage it for them. We have much earlier engagement with them and an opportunity to ask the detailed questions we need to populate PCS-Tender. We didn’t always have this opportunity for early dialogue before, so it has forged a closer partnership, giving them professional procurement advice while keeping control of their own content. It has been accepted as a fantastic tool all round.”

## PCS-Tender functionality has streamlined many practices

As well as providing visibility across every tender, the system has greatly enhanced individual practices. For example, PCS-Tender holds a complete set of policy-approved qualification questions. The buyers can use **standard templates** which are up to 90 percent complete. “The system has brought us so many benefits,” said Tricia, who uses the software on a daily basis, “before we had to upload the ITT and specifications into the website, the supplier would download them and upload the submission. Then we would retrieve the submission and open it. PCS-Tender has stripped out all that unnecessary waste from our procurement process, there is no duplication of effort and therefore timescales are reduced. We populate a template and build our tender in the system, rather than prepare one and upload it. The supplier can easily find the relevant project, or even click through from PCS-Advertising, and go in to provide answers. Notification is automatic so there is a clear audit trail of when a submission is made; it’s all in one place.”

The system has encouraged **collaborative working**. Version control allows users in the different departments to create, view

and edit sections of the tender documentation at the same time. Workflow functionality can also create email alerts that inform a user when a colleague has made a change, or when a supplier has posted a response.

“PCS-Tender has eliminated the problems of having to share paper-based tender documentation across the departments. It used to be difficult to ensure that all information was available when we needed it, or even to identify where it was kept. Now there is visibility across departments that were once working in isolation. We have developed templates that we issue to gather the right information for us to build the tender. The departments have been trained to use the system, but within certain parameters. They cannot go out to tender themselves, only we have the user rights to build and publish projects on their behalf so it keeps the process manageable and accountable. We all work together as a team, and we are now seen as adding value; PCS-Tender has engendered a greater trust between us.”

The software assists in ensuring good practice when it comes to evaluation, the corporate team has the role of “moderator,” which means it can facilitate the evaluation. “We are able to oversee the evaluation,” explains Tricia. “The departments are still the evaluators but now it is carried out within the system, where they can score and leave comments. We have the ability to sanity check the scores and look for consistency. Sometimes we might



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find anomalies of scoring which can lead to differing scores. We can then ask why, for example, a supplier scored only 3 from an evaluator while 20 from another. It means we can ask the right questions and achieve agreement and fairness to all suppliers. This only happened before if the department came to us for help. We can be sure there is no collusion, because everything is transparent.”



“We are called upon to attend supplier debriefs. Even though we haven’t been involved during the actual evaluation, the system gives us the visibility so we can stand back, be an objective third-party, and confirm that the evaluation plan was followed accurately. All information is in the system which gives a secure history of each tender from creation to award – a true and accurate record.”

Diane added: “Some public bodies are using PCS-Tender like us, in its entirety, but some use it only as a document repository, issuing tenders but evaluating outside. I can only say that evaluators who have never seen it before will find that it’s not that different from what they are already doing. The theory is exactly the same, it’s just that the practice is electronic, entering scores and comments just as before. We are using the system to its maximum potential, it is there to make our lives easier; our view is that if you’ve got a tool that’s been developed to manage the whole process – then why not use it?”

## Bringing value to the front line service

As well as the software, Scottish Government provided support and training that was easy to follow. Along with the intuitive nature of the system, Tricia, who classes herself as a ‘techno-phobe’ was able to help Diane lead on this project. “Once you understand the rationale behind PCS-Tender, it all makes sense. I now find it very easy to use. It has automated everything for us; I am doing what I did before but faster and more effectively. For example, an ITT is no longer 10 to 15 pages long. PCS-Tender replicates the ITT and breaks it down into manageable sections and questions. If we need to make changes, it’s easy, we just press edit and amend or add something – it’s that simple.”

“No two tenders are ever the same,” explains Diane, “you always come across challenges, so having confidence in yourself, being able to go back and check what you did when something goes wrong, is a great benefit to any procurement team. PCS-Tender asks you the right questions and so forces the thought process behind the answers. You can’t take any shortcuts as the system won’t let you. It has forced us to think hard about how we do things. And when you start looking in detail, you can find practices you know you need to fix. For example, we discovered that some procurers were using the same template for everything, and hence asking the wrong questions in the wrong places. If input is not the best, then our outcomes will not provide the much sought-after what we call, “Value for Moray.” So we make sure we keep the clarity to see what’s going on in the departments, it’s the vehicle that lets us in. We would not be where we are today if it were not for PCS-Tender; if you have concerns over how things are being done, if you don’t have full visibility, then it’s the one tool that brings procurement to the front-line.”



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