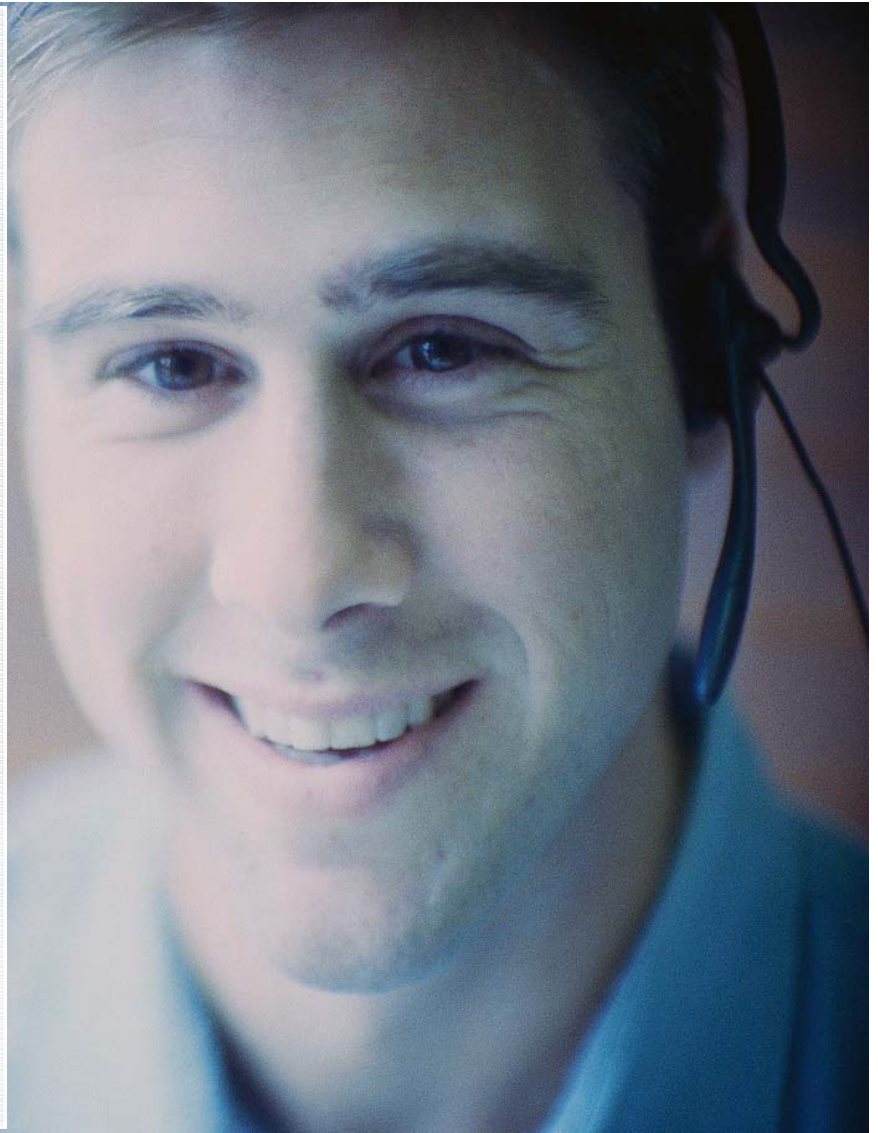


Customer Care Commitments

Procurement Services

2010



Procurement Services
West Lothian Civic Centre
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01506 281805
ProcurementServices@westlothian.gov.uk

This document outlines the standard of service and communication that customers of Procurement Services can expect. The Customer Care Commitments have been developed in accordance with the corporate guide, 'The West Lothian Way'.

Introduction


The West Lothian Way provides the framework for communicating within and on behalf of West Lothian Council. This has been developed in accordance with the Council values.

Procurement Services is committed to the highest standards of customer care and following the corporate ethos of putting the customer at the heart of everything.

This Customer Care Commitment document has been developed in accordance with The West Lothian Way and incorporates specific service standards for the unit¹.



Council values:

- ✓ Focusing on our customers' needs
 - ✓ Being honest, open and accountable
 - ✓ Providing equality of opportunities
 - ✓ Developing employees
 - ✓ Making the best use of our resources
 - ✓ Working in partnership
- 

¹ This document should not be read in isolation, but in conjunction with The West Lothian Way

Service Standards

Procurement Services is a Council wide support service whose principal activity is to satisfy the supply and service needs of West Lothian. By following internal rules such as Standing Orders and ensuring compliance with UK and EU Procurement Directives when tendering for contracts, we secure competitive prices and advantageous terms and conditions and demonstrate probity.

Our vision

“Supporting front-line services by providing a professional, customer focused, Procurement Service”

In order to achieve this we aim to:

1. Process PECOS orders routed to Procurement for existing suppliers within one working day.
2. Ensure that all competitive tendering carried out by Procurement Services adheres to EU Procurement Directives, International Trade Treaties, UK & Scottish legislation and Council Standing Orders in order to demonstrate Best Value and to ensure transparency.
3. Provide Guidance and Advice to all Council Service Areas on compliance with all procurement legislation and Council Standing Orders in order to ensure best value and probity.
4. Ensure that all stakeholders are treated fairly by helpful well informed staff
5. Consult with customers to ensure that the goods and services covered by the contracts we procure meet their needs.
6. Consult with customers to agree a timescale for tendering procedures.
7. Consult with customers to monitor and review supplier performance by carrying out at least 6 contract customer satisfaction surveys per year.
8. Deal with concerns and complaints about our services within 5 working days.
9. Give customers equal access to our services, through appropriate multiple contact and information methods.
10. Promote the use of electronic procurement processes throughout the council.

Review of Service Standards

Procurement Service's standards are available to all our customers, through a variety of formats. They are comprehensive and cover the key aspects of quality of service expected by our customers. The standards also include targets, which will be monitored on a regular basis and reviewed annually. Customers will continue to be consulted on the unit's service standards and their suggestions incorporated into the annual review.

Our team

Our staff are our most valuable asset and are key to the delivery of excellent services for our customers. The Procurement Services team has 12 highly-trained members, providing professional support and guidance to our customers on all areas of procurement activity.

Each member of the Procurement Services team undertakes an annual evaluation of their performance using the corporate Performance Review programme (PRPDP). Customer feedback and the team's customer satisfaction data is used by the manager and the member of staff as part of the individual review process. Training and development needs are identified as part of the annual review.

The team also review performance against standards and levels of customer satisfaction in team meetings.

Our customers

Our customers are:

- ✓ Contract customers
- ✓ PECOS customers
- ✓ Heads of service and/or senior management
- ✓ Contracted suppliers
- ✓ Potential suppliers

Our partners

Our partners include:

- ✓ Scotland Excel partnership
- ✓ Procurement Scotland
- ✓ Scottish Local Government Procurement Forum

Communicating with customers

In accordance with [The West Lothian Way](#) Procurement Services Customer Care Commitment aims to:

- ✓ Raise awareness and understanding of the value of communicating effectively with customers
- ✓ Encourage and enable employees to be more responsive to customers' needs
- ✓ Support the right of all customers to expect excellent service

This means that the service is committed to knowing:

- ✓ Who our customers are
- ✓ What our customers want
- ✓ What focusing on our customers' needs means in practice
- ✓ How we communicate with our customers
- ✓ What we are already doing to improve communication with customers
- ✓ How to put the Council message across
- ✓ What we have planned for the future

Procurement Services understand that to deliver services that meet customer needs and preferences, there is a need to communicate and interact with customers. Over the years, the service has worked to improve engagement with our customers and develop a greater insight to what they need and expect from us.

The Customer Care Commitment document re-affirms this long-standing commitment to understanding our customers and the valuable contribution they make to our service improvement and planning processes.

Customer involvement and engagement methods

Procurement Services will ensure that it continues to deliver services that are responsive to the needs and preferences of customers and meet the statutory duties. To do this, the service has made a commitment to involve customers in the planning, review and improvement of the service.

Customers are engaged through a variety of methods, including:

- ✓ Surveys and satisfaction surveys
- ✓ Focus groups
- ✓ One-to-one meetings and briefings

All formal and informal comments, complaints and feedback from customers will also be incorporated into any review of the service and any resulting improvement activity.

Full details of consultation activity are available in Procurement Services' consultation schedule.

Customer access channels

Customers can access Procurement Services in a variety of ways, including:

- ✓ Telephone
- ✓ Email
- ✓ Meetings and briefings
- ✓ Internet and Intranet
- ✓ Other written communication

The service recognises that different customer groups have different preferences or requirements for communication. There are also a number of tailored access channels for specific customers, including:

- ✓ Reports and briefings for Heads of Service and senior managers
- ✓ Printed tender submissions for suppliers without access to e-technology
- ✓ Presentations and forum attendance for small business networks that have difficulty engaging with, or accessing, the service

These multiple contact methods afford our customers choice in communication and make our service more accessible. The strong culture of customer engagement in the service also ensures that our staff are empowered to offer flexibility to the customer in the way that they can access the service. Customers are also encouraged to contact the service if they have any specific contact needs or requirements.

Meeting with customers face-to-face

Procurement Services staff have regular face-to-face contact with our customers. This may involve scheduled meetings or briefings with customers visiting the premises.

When meeting our customers face-to-face, our staff, as representatives of Procurement Services, will be polite, friendly and helpful.

Telephone techniques

Answering the telephone

Our staff will:

- ✓ Always answer calls by saying 'good morning/afternoon', followed by the name of their section.

When away from their desk they will:

- ✓ Ensure another member of the team can answer the phone
- ✓ Divert the phone to voicemail
- ✓ Divert the phone to an alternative contact who can deal with enquiries, particularly when they are out of the office for a sustained period

Staff will also adhere to the telephone protocol designed for use in the Civic Centre.

Dealing with challenging situations

Procurement Service's staff who find themselves dealing with a difficult situation with a customer will remain composed and take a note of the facts, whilst continuing to be polite, friendly and helpful. Consistent with the commitment to treat all customers equally, Procurement Service's staff will always ensure that customers are treated fairly. If an immediate solution is not possible, the customer will be informed of the action that will be taken and when a resolution is likely.

When callers become abusive staff will resolve the situation in accordance with the guidelines on [page 20](#) of the West Lothian Way. Staff will pass details of all abusive and difficult customers to their line manager.

It is foreseeable that issues may arise that affect the continuity of service supplied by Procurement Services. When such issues arise staff will contact the affected parties and provide information on:

- ✓ The problem itself
- ✓ Action being taken to remedy the problem
- ✓ Expected timescales for the problem to be resolved
- ✓ Contact details for any questions, concerns or feedback

PECOS users will be notified by email whenever the system is unavailable or the information contained in the system is not current.

Customer complaints, comments and compliments procedure

Procurement Services has developed a customer complaints, comments and compliments procedure. This outlines the following:

- ✓ How to make a complaint
- ✓ How the service will deal with your complaint
- ✓ How to make a comment or compliment

All Financial Management Unit staff are provided with guidance (complaints, comments and compliments procedure) on how to respond to customer complaints and therefore are empowered to deal with any issues arising.

Freedom of information

The Freedom of Information (FOI) (Scotland) Act 2002 allows the right for people to access information held by Scottish public authorities.

The council is legally required to deal with all FOI enquiries within 20 working days.

Stephen Berwick (01506 281801) is the team's Information Liaison Officer. When staff receive an FOI call they will advise the caller to put the enquiry in writing to: procurementservices@westlothian.gov.uk.

Equal opportunities

Procurement Services and our staff are committed to providing equality of service, regardless of individual circumstances. This is in accordance with [The West Lothian Way](#).

Communicating with disabled customers

Procurement Services staff will treat disabled customers with the same respect and level of service as any other customer. Should a customer require further assistance then we will endeavour to provide it.

Interpretation and translation services

Procurement Services will ensure that relevant printed material produced will include a statement offering the information in alternative formats and languages, i.e. Braille, tape, large print and community languages.

Technical information and concepts

Procurement Services may have to provide information that could be considered as complicated and/or technical in nature. To ensure that no customer feels excluded from procurement processes, staff will endeavour to provide advice and support in a way that is understandable to the customer.

Plain English

Procurement Services is committed to using Plain English in all relevant correspondence to ensure that documents are as customer friendly as possible.

Working with the media

Any enquiries made to Procurement Services from the media will be directed to the Council's Corporate Communications team (communications@westlothian.gov.uk).

Working with each other

Procurement Services staff work with every service within the council. They have an obligation to work effectively with employees in all services in order to create a culture of co-operation and trust.

Our staff recognise that good internal communication provides the essential link between colleagues to ensure efficient service delivery

Conduct

Procurement Services staff will be treated in a fair and reasonable manner and are encouraged to approach line managers if they have any concerns or worries. Staff are expected to treat each other and all people they come into contact with in a similar fashion.

Team briefing and guidance on group meetings

Procurement Services have regular, scheduled team meetings with an agenda. Team members can also raise other matters under any other business.

Following the meeting an action note will be prepared and available on Meridio. This action note will be monitored at the subsequent team meeting and tasks checked off as completed.

Staff suggestions and ideas

Procurement Services staff are actively encouraged to put forward suggestions and to contribute ideas towards improving the service.

There is a variety of forums in which they can do this, including weekly operations meetings, monthly team meetings, away days, a suggestion box, or by approaching their line manager directly.

All suggestions will be considered in a fair manner and feedback will be provided to staff when a decision is made.

Publishing on the internet

Procurement Services have a website which will contain information on the service and relevant contact details.

Staff are encouraged to familiarise themselves with the content of the website and contribute to its ongoing development.

Email

Procurement Services staff will open their email each day when they log into their computer. They should react promptly to any mail received.

Whilst personal e-mails are permitted they should not take priority over the teams work responsibilities.

The Council has an [Email & Internet Systems Policy](#), which was introduced on 1 June 2005. All employees are required to adhere to the policy on the use of council Internet and email systems.

Review of customer consultation documentation and strategies

The Customer Care Commitment and Communication documents are key components in ensuring the service continues to provide excellent services and communicate effectively with customers. Procurement Services will review these documents on an annual basis and other customer service related documents to ensure that they remain applicable to customers and the services provided.

Additional information

Any queries or questions on this document or [The West Lothian Way](#) and the supporting guidance should be referred to Procurement Services manager, Tom Henderson (01506 281805 or tom.henderson@westlothian.gov.uk).

Any feedback or comments on this document would be appreciated.

Appendix A: Customer and Staff Consultation Programme
2010

<i>Customer Segment</i>	<i>Consultation Type</i>	<i>Sample Size</i>	<i>Frequency</i>	<i>Method</i>	<i>Rationale for Method Chosen</i>	<i>Objective</i>	<i>Improvement Activity</i>	<i>Improvement Implemented</i>
Contract Customers	Contract customer meeting	Approx 45 (based on WLAM units)	Pre and during tender process	One-to-one meetings	Face-to-face meetings necessary to promote two way communication	<ul style="list-style-type: none"> • Opportunity to establish requirements, provide advice on specification and evaluation criteria and update customer on progress throughout the tender process. 	<ul style="list-style-type: none"> • Contract that meets the needs of the user • Specific issues raised and addressed quickly 	Yes
Contract Customers	Customer post tender review survey	6 ² so far	One per tender – issued after contract award	Opinion Taker survey	Effective method of seeking feedback on how Procurement Services performed	<ul style="list-style-type: none"> • To measure customer satisfaction • To seek feedback and suggestions for improvements 	<ul style="list-style-type: none"> • Comments and suggestions discussed at team meetings and improvements to the service identified • Specific issues raised and addressed 	None to date
Potential Supplier	eTender feedback page	Approx 150 per annum	One per tenderer (per eTender exercise)	Feedback page within eTender	Effective method of seeking feedback from potential suppliers	<ul style="list-style-type: none"> • To seek insight on the suppliers' experience when using the eTender tool • To identify potential improvements to the process 	<ul style="list-style-type: none"> • Identify improvements to the eTender process 	Yes
Contract Customers/ Potential Customers	Internal customer questionnaire	37	Bi-annually	Opinion Taker survey	Effective method of reaching this large group whilst also allowing anonymity	<ul style="list-style-type: none"> • To measure customer satisfaction • To gain customer opinion on general service delivery and specific issues 	<ul style="list-style-type: none"> • Identify any improvements / changes to the service we deliver to customers 	Yes
PECOS customers	PECOS customer questionnaire	33	Bi-annually	Opinion Taker survey	Effective method of reaching this large group whilst also allowing anonymity	<ul style="list-style-type: none"> • To measure customer satisfaction • To gain customer opinion on PECOS specific issues 	<ul style="list-style-type: none"> • Identify any improvements / changes to the system that will improve users' experience 	Yes

² Anticipated annual sample size = 30

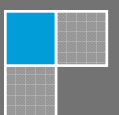
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Suppliers/ Potential Suppliers	Local Small/Medium Enterprises questionnaire	200	Annually	Opinion Taker survey	Effective method of seeking feedback from this hard to reach group	<ul style="list-style-type: none"> To identify barriers that prevent SMEs accessing council contracts To increase the amount of council business placed with local SMEs 	<ul style="list-style-type: none"> Removal of barriers Increased amount of council business placed with local SMEs 	Yes
Heads of Service/ Senior Management	Procurement forum	12	Bi-monthly	Group Meeting with senior staff for each service area	Effective method for communicating Procurement Strategy issues and seeking feedback on strategic issues	<ul style="list-style-type: none"> To ensure the Procurement Strategy is embraced by the whole organisation To seek feedback on strategic issues 	<ul style="list-style-type: none"> Identification of measures that will aid achievement of strategic objectives 	Yes
Contract Customers/ PECOS Customers	Procurement customer focus group	16	Quarterly	Group Meeting with operational staff from each service area	Effective method of seeking feedback from all service areas	<ul style="list-style-type: none"> To identify issues that are problematic for our customers To share information and educate our customers To develop mutual understanding 	<ul style="list-style-type: none"> Implementation of methods and processes that make things easier for our customers 	Yes
NA	Staff questionnaire	10	Annually	Anonymous Opinion Taker survey	Effective method of seeking feedback from the team, whilst allowing anonymity	<ul style="list-style-type: none"> To identify issues that are important to the team To establish how well managers perform on the issues that are most important 	<ul style="list-style-type: none"> Changes in management practices Increased staff satisfaction levels 	Yes

2010

Customer Segmentation Matrix

Procurement Services

This matrix assists Procurement Services in defining and understanding who our customers and stakeholders are, the groups that they belong to and the variations between. Enabling us to develop our services to their requirements and needs by setting out our plans for meaningful consultation and engagement with the people we deliver services to.



Who we are

Procurement Services provide a council-wide procurement function, with the principal aim to satisfy the supply and service needs of the organisation. This is achieved by obtaining the most economically advantageous prices available, supported by the best possible terms and conditions.

The main areas of our work are:

- ✓ Conducting tenders and establishing supplies and services contracts for our customers
- ✓ Sourcing non contracted supplies and services on behalf of customers
- ✓ Providing easily understood procurement procedures and professional procurement guidance and advice for our customers
- ✓ Promoting the use of electronic procurement processes throughout the council
- ✓ Ensuring compliance with council Standing Orders
- ✓ Ensuring compliance with applicable Scottish, national and European procurement rules and legislation
- ✓ Minimising commercial risk on behalf of the council

The service has a key role in supporting the council in the delivery of long-term outcomes. The Procurement Strategy, which has been aligned to corporate objectives, was established to define and achieve measurable benefits for the organisation from procurement activity.

Our core values and objectives

The council's commitment to developing high quality services, based on the needs of communities, is supported by Procurement Services, with our key activities aligned to the corporate values and objectives.

Council mission

Striving for Excellence . . . Working with and for our communities.

Council values

- ✓ Focusing on our customers' needs
- ✓ Being honest, open and accountable
- ✓ Providing equality of opportunities
- ✓ Developing employees
- ✓ Making the best use of our resources
- ✓ Working in partnership

Procurement Services' mission

"Supporting front-line services by providing a professional, customer focused, Procurement Service"

Critical success factors

To achieve our mission we must:

- ✓ Fulfil our commitments to our customers and meet their needs and expectations
- ✓ Nurture and involve a capable and valued workforce
- ✓ Engage and involve customers and stakeholders
- ✓ Meet the requirements of the law, regulatory bodies and standard setting agencies
- ✓ Manage our resources efficiently and effectively

Our approach to service delivery

Procurement Services are committed to providing a comprehensive and supportive service to our customers. We aim to design, develop and deliver a service that is based on their needs and preferences and is responsive to their individual requirements. Principally, we aim to support services in all procurement activity and maximising the value they achieve.

The service also participates in innovative national collaborative procurement projects to deliver value for money for our customers and the people of West Lothian through partnership-working.

Our main activity areas are delivered by a dedicated team of specialists. The service has 12 highly-trained members of staff,

providing professional support and guidance to our customers on all areas of procurement activity.

Our Management Plan sets out in detail how we plan to deliver our service activity and how this is aligned to the aims of the Community and Corporate Plans. For more information, the Finance Services management plan can be viewed here: http://webwest1.app.westlothian.gov.uk/serviceplan/svceplans_newm_enu.htm

Our approach to segmentation

A key indicator of our success in meeting long and short-term aims of the service is the levels of satisfaction of our customers. We ensure that compliance with strategy, policy and procedure is balanced with meeting the needs and preferences of our customers.

Only by identifying who is accessing our services and critically, who **should** be, accessing our services can we target communications, opportunities for involvement and future developments towards those who need them the most.

We have developed a range of options for engagement and consultation, tailored to the preferences of individual customer groups. The insight and information gathered from these exercises is, and will be, used in the planning, prioritisation and review of services and to identify potential improvements and efficiencies. This ensures that we have embedded a culture of continuous improvement, where all staff value meaningful consultation, feedback and suggestions from our customers in service development activity.

We have segmented our customers into the main groups of service users in order to understand the variations between the groups. Another key document, the [Customer and Staff Consultation Programme](#), compliments this matrix as it details each of the key customer groups, the frequency, the method, objective and service action required.

Who our customers are

Knowing and understanding who our customers and stakeholders are is critical to our strategic planning and operational service delivery. Our approach to engagement and consultation has enabled us to identify who the recipients and potential recipients of our services are.

We have identified the following groups as the Key Customers of Procurement Services:

- ✓ Contract customers
- ✓ PECOS customers
- ✓ Heads of Service and/or senior management
- ✓ Contracted suppliers
- ✓ Potential suppliers

Review of the matrix

This customer matrix is a key component in ensuring that we continue to understand our customers and their requirements. To ensure that this document remains applicable to the services we provide, the matrix will be reviewed on an annual basis as part of the management planning process.

Conclusion

The segmentation of our customers into key groups allows us to better understand and identify the needs, motivations and choices of customers. Procurement Services has identified customers and stakeholders to help direct and shape our services to their needs. This key document includes our main customer groupings whilst also demonstrating the rationale behind the segmentation approach chosen.

Any queries or questions on this document should be referred to the Procurement Services manager, Tom Henderson (tom.henderson@westlothian.go.uk.)

Customer Segmentation Matrix

<i>Customer Segment</i>	<i>Characteristics</i>	<i>Needs</i>	<i>Communication Methods</i>
Contract Customers	<ul style="list-style-type: none"> Operational management Focus on service delivery Close interaction with day to day business of service Budget Management responsibility Detailed knowledge of contract commodity 	Support from Procurement Officer with regard to: <ul style="list-style-type: none"> Specification writing Evaluation criteria and methodology Tendering Timetable Contract Management Issues 	<ul style="list-style-type: none"> Email Telephone Meetings / Face to Face contact eSourcing Collaborator Facility Customer focus group
PECOS Customers	<ul style="list-style-type: none"> Operational support staff Often have limited IT skills Place orders on behalf of their team – orders originated by someone else 	<ul style="list-style-type: none"> User friendly eProcurement system Clear and Concise user guidance Timely response to system queries 	<ul style="list-style-type: none"> Assyst Telephone Email Online User Guides Customer focus group
Heads of Service and/or Senior Managers	<ul style="list-style-type: none"> High level management Strategic considerations Ultimate budget holder for respective areas Time limited 	<ul style="list-style-type: none"> Input to Procurement Strategy Information on the collaborative procurement landscape Information on non compliance issues in their service 	<ul style="list-style-type: none"> Procurement Forum CMT reports Email Telephone One to one meetings
Contracted Suppliers	<ul style="list-style-type: none"> External to the organisation Keen to forge good working relationships with end users and Procurement Wide range across all commodities Vary in size from Multinational companies to micro organisations 	<ul style="list-style-type: none"> Clear and concise specifications Regular feedback Prompt payment User friendly ordering mechanisms Named contacts in service areas and procurement 	<ul style="list-style-type: none"> PECOS orders Face to face meetings Email Telephone Variation documentation
Potential Suppliers	<ul style="list-style-type: none"> External to the organisation Keen to forge good working relationships with end users and Procurement Wide range across all commodities Vary in size from Multinational companies to micro organisations 	<ul style="list-style-type: none"> Information on potential contract opportunities Advice on how to win council business 	<ul style="list-style-type: none"> Public Contracts Scotland Website Business Gateway eZine Procurement Surgery

<i>Customer Segment</i>	<i>Consultation Type</i>	<i>Sample Size</i>	<i>Frequency</i>	<i>Method</i>	<i>Rationale for Method Chosen</i>	<i>Objective</i>	<i>Improvement Activity</i>	<i>Improvement Implemented</i>
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Procurement Services

Service Standards

Procurement Services is a Council wide support service whose principal activity is to satisfy the supply and service needs of West Lothian

By following internal rules such as Standing Orders and ensuring compliance with UK and EU Procurement Directives when tendering for contracts, we secure competitive prices and advantageous terms and conditions and demonstrate probity

Our vision

“Supporting front-line services by providing a professional, customer focused, Procurement Service”

In order to achieve this we aim to:

1. Process PECOS orders routed to Procurement for existing suppliers within one working day.
 2. Ensure that all competitive tendering carried out by Procurement Services adheres to EU Procurement Directives, International Trade Treaties, UK & Scottish legislation and Council Standing Orders in order to demonstrate Best Value and to ensure transparency.
 3. Provide Guidance and Advice to all Council Service Areas on compliance with all procurement legislation and Council Standing Orders in order to ensure best value and probity.
 4. Ensure that all stakeholders are treated fairly by helpful well informed staff
 5. Consult with customers to ensure that the goods and services covered by the contracts we procure meet their needs.
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