

# ***Competitive Dialogue & Communication***

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## *Objectives of this session*

1

To introduce the competitive dialogue & communication process to you

2

When to use it and how to communicate

3

Provide an example

4

Discussion

## ***What is it Competitive dialogue?***

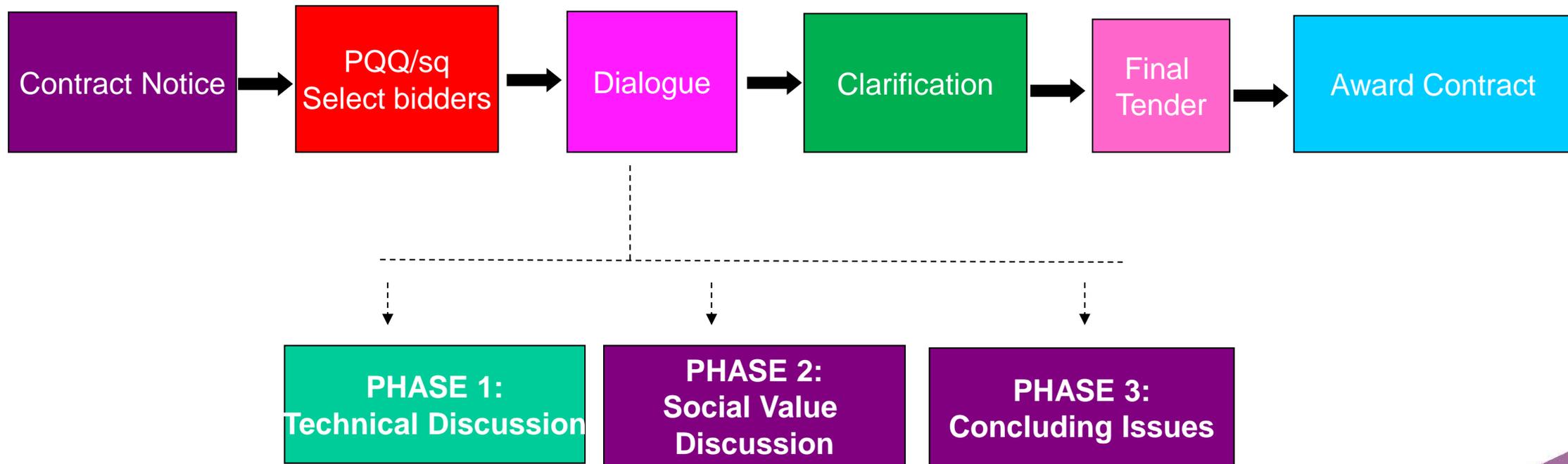
**Competitive Dialogue (CD) is a formal procurement procedure where the Contracting authority conducts a dialogue with suppliers following a contract notice.**

**A selection process is developed and suppliers are admitted to the procedure with the aim of developing 1 or more suitable suppliers capable of meeting its requirements**

## When to use it?

- Competitive dialogue is used usually for large complex procurements and when the technical or commercial solution is difficult to define
- Where you are not sure what of the exact requirements and you want to engage with the market so that experts (suppliers) define the detail
- Opportunity to discuss proposals and tailor the deliverability and affordability

# Dialogue outline process



# Communication

## *Pre-tender phase activities*

- Market engagement strategy - contracting authorities may conduct market consultations with a view to preparing the market for upcoming procurement
- Events to communicate your strategy and approach
- Market analysis, capacity and capability assessment
- Prior Information Notice (PIN) Indicative notice is an advanced warning of a contract to be awarded at some time in the future
- Meet the Buyers event, trade shows, Request for information (RFI)
- Co-design, involving stakeholders in the product or service design, specification and sourcing process
- Early supplier involvement in product development

## *During Procurement*

- Council uses E-Tendering Portal, in helps with electronic audit trails, information management, on-line communication
- Question and Answer facility to have continued communication during tender, private and public questions. Communication exchange is logged in the system
- Maintain key principles of transparency, integrity, economy, openness, fairness, competition and accountability, ensure good record keeping
- Bidders briefing sessions, Tender advert and documentation pack
- Post tender debrief
- Contract award
- Mobilisation and transition period
- Contract Management and delivery

# Preparation for Dialogue

- The core team involved in all of the dialogue sessions across the dialogue topics enables a consistent view across the different topics
- The core team will be supplemented by specialists on specific topics being dialogued.
- Undertaking dialogue is time consuming & resource intensive
- You need to balance the need to work to a concise time period with the need to ensure enough time to prepare, dialogue and debrief
- Two streams to the dialogue – (a) operational services and (b) commercial with core membership and specialists who attend specific sessions depending on the topics to be discussed: e.g. social value/responsible procurement
- Ensure accurate note taking and audit trail

# Example: Planned Maintenance Improvement project

Procurement stage	Purpose	No of Bidders
The market		
PQQ/SQ evaluation	<p><b>Evaluations You have the right credentials and track record to deliver</b>, Capability, experience and financial standing</p> <p>Invited to a initial briefing session on social value. communicated our strategy and desired outcomes</p>	10
Dialogue Phase	<p><b>Evaluations and moderations recommended top 5 to be invited for dialogue</b></p> <p><b>Held competitive dialogue sessions and provided feedback, exchange of information</b> Subject matter experts around Employment, economic growth and Social Value.</p>	5
Evaluation/ moderation Phase 2	<p><b>We have an agreed solution</b></p> <p>A complete and competitive solution which is fully moderated and priced</p>	3
Selected Bidder	<p><b>The best solution and partner recommended for award</b></p>	1

## Social value KPI's promise matrix example

KPI	MLAP	TARGET
SV1 – New job starts for Croydon residents	12 FTE	18 FTE
SV1 – New graduate starts for Croydon residents	2 FTE	4 FTE
SV1 – Priority group job opportunities	6 FTE	11 FTE
SV1 – Proportion of workforce who are Croydon residents	40% of FTE	50 % FTE
SV2 – New apprenticeships and work placements provided to priority groups	10 FTE	15 FTE
SV2 – Work placements	30 weeks	40 weeks
SV3 – Number of priority groups supported	8	12
SV3 – Percentage of supply chain in Croydon	30%	40%
SV3 – Training days undertaken by small Croydon companies	50 days	80 days
SV4 – Number of volunteering days	50 days	80 days
SV4 – Number of community initiatives supported held	6 days	10 days

# Social value mobilisation & delivery meeting example

## Agenda item

### 1- Social value Group Terms of Reference

-Core purpose

### 2- Progress report

-Review of actions from last meeting

-Social value implementation plan

### 3- KPI review

-Agree/review target outcomes/performances

-Measures for improvement

### 4- Risk management

-/review risk register

### 5-Any other business and date of next meeting

- Actions from social value group (date)

Rev	Action point	By Whom	Target Date
SV1			
SV2			
SV3			
SV4			
SV5			
SV6			
SV7			

## Best Practise & Lessons Learned

Item	Comment
Planning	<p>Project Manager –relationship management Advance planning is essential Milestone plans, detailed stage plans and resource plans, daily/weekly plans &amp; task lists</p>
Allow Time	<p>To do it well you need to build realistic timing &amp; resource. Don't arrange back to back meetings. Allow time to prepare, conduct &amp; complete notes and administration so fully documented. Follow up actions between meetings and between submissions and evaluation &amp; moderation meeting</p>
Negotiations/Dialogue	<p>Plan your dialogues &amp; negotiation strategy what are your objectives, negotiate and persuade Have agendas and stick to them</p>
Governance & Risk	<p>Steering Group &amp; Procurement Governance project board Set up and include in planning and maintain risk log</p>
Documentation	<p>Document version control, QA, &amp; auditable sign off are essential, Use of E-tendering portal saves time, cost &amp; resource on tender administration and maintains good audit trail</p>
Administration	<p>There is a mountain of Record keeping: data room, clarification questions, due diligence, booking rooms, multiple diaries, meetings , project plans, minutes, reports. Make sure you have admin and project officer resourced.</p>

# Thank you!

## Croydon Council contract delivers local jobs and apprenticeships

November 2, 2016



A council contract that guarantees jobs for more Croydon people has led to building company Mulalley adding over 30 companies and six local apprentices to its books.

When Croydon Council awarded Mulalley its five-year, £12m general building works contract in April, it included a requirement to take on around 30 local new starters from within the borough each year.