

# Pathfinder Programme - Community Wealth Building

**PROJECT TOOLKIT**

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## Introduction

This toolkit has been prepared to support the implementation of the Pathfinder Programme – a project run by Scotland Excel in partnership with Scottish Government, which aims to deliver local capability and impact on inclusive and green economic growth through a Community Wealth Building (CWB) lens.

Focussing on the ‘Progressive Procurement’ pillar of Community Wealth Building, the project comprises several streams of interdependent activity, which have been designed to instigate discussion, challenge thinking and practices within your organisation, and provide direction and tangible take-away actions for your consideration.

The project advocates the Scottish Model of Procurement, reflecting on the Sustainable Procurement Duty as a key driver of procurement activity and the Sustainable Procurement Tools as an enabler to optimise economic, social, and environmental outcomes. Focussing on the power of public spending, the project supports the delivery of strategic objectives and sustainable economic growth.

## Pre-Project Planning

It is recommended that initial meetings with relevant senior stakeholders are to be held, including managers from Procurement, Economic Development, Employability, and other Service areas. Other departments may be invited if deemed suitable by the council e.g., Finance and HSCP.

### Questions to start discussions:

- What is your understanding of the term Community Wealth Building?
  - Please consider work that may be taking place currently under different models/approaches, such as Sustainable Procurement, Inclusive Growth, Place-based Economic Development and Community Benefits.
- Do you feel that the council utilises a Community Wealth Building approach in your area?
- Where do you feel the council has reached in its Community Wealth Building journey?
- What are the council’s key priorities? It is important to understand where the focus lies for the council.
  - How much of a focus is on spending locally? How does this compare to other priorities e.g., employability, making savings, climate emergency? Local priorities need to be established, although, as reflected in the sustainable procurement tools, different priorities can be addressed in different procurement exercises.
- Do you feel improvements could be made in your area to support Community Wealth Building? If yes, can you identify these improvements?

This meeting is designed as an information gathering stage, to understand the council's Community Wealth Building journey to date. It is important to find out what stage the council is at in this journey to allow preparation for the subsequent workshops.

## Project Breakdown

The Community Wealth Building Project consists of six streams of activity; Internal Partner Engagement, Data Analysis, Grow Local, Quick Quotes, Public Contracts Scotland advertising portal, and External Partner Engagement.

These streams are interdependent in nature and not designed to be run through in a linear manner, but progressed concurrently with outputs from each stream informing activity and content within others. It is however recommended that the streams are initiated in the order set out below within this toolkit; activating a community wealth building network to support activity, building knowledge and understanding through analysis, evaluating current processes and procedures and considering your wider community to support your aims.

Timelines for this project are flexible, depending on a number of factors, including council priorities, resource availability and access to data, but it is anticipated that the project will be carried out over the course of a couple of months by a project team. Time will be required beyond this to embed any identified recommendations and fully establish new working practices.

## Project Streams

### 1) Internal Partner Engagement

To progress community wealth building within your council, it is key to engage with internal colleagues to develop a shared understanding of local procurement and identify opportunities to leverage council spend to boost economic wellbeing in your area.

Scotland Excel will work with councils to create and deliver two internal workshops:

- Progressive Procurement Workshop
- Elected Member Workshop

#### Progressive Procurement Workshop

This workshop uses data-led analysis to contextualize the wider Scottish Public Sector and local authority landscapes, and support increased emphasis in community wealth building. Focusing on analysis of spend and supplier data specific to the local area, this workshop provides an exploration of current and future community wealth building opportunities around procurement within your council.

Designed to instigate discussion around the concept of community wealth building and local procurement, this workshop brings together council officers, including service delivery

specialists, economic development professionals, employability officers and procurement practitioners.

Click on the link to view and edit the [Progressive Procurement Workshop Presentation](#). The file will open in PowerPoint, and you will be able to enter your council specific data. Please note, data shown in this template is for illustrative purposes only.

### [Elected Member Engagement Workshop](#)

This workshop has been designed for Elected Members to develop an increased understanding of existing good practice within their council, consider the “art of the possible” in their locality and to create links around the Scottish Model of Procurement to support community wealth building objectives.

Focussing on the power of public procurement as key tool in delivering community wealth building, key elements from the Progressive Procurement workshop will be discussed, providing context, and highlighting ways in which councillors can support their local authority's community wealth building plans.

The Spending Power Infographic (see stream 2 – Data Analysis) will be provided, offering a current local economic snapshot to take-away.

### [Internal Stakeholder Mapping and Engagement](#)

Our tool will help you to identify and map individuals within the organisation, in relation to community wealth building aspirations. Containing a power/influence analysis and engagement plan, completion of this exercise will provide information on those who are key to supporting the growth of community wealth building within the council and will generate a plan of engagement with tangible actions that support the project aims.

Click on the link to view and edit the [Internal Stakeholder Mapping and Engagement Tool](#). The file will open in Word, and you will be able to enter your council specific data.

### [Procurement Community Wealth Building Charter](#)

Providing a good practice example from Stirling Council specifically relating to the community wealth building pillar of ‘Progressive Procurement of Goods and Services’, the Charter seeks to embed community wealth building principles within procurement practice and sets out how Stirling Council are going to do this.

The objective is to maximise economic, social, and environmental benefit for the community, through development of dense local supply chains of businesses likely to support local employment and retain wealth locally. These include SMEs, employee-owned businesses, social enterprises, co-operatives, and community businesses.

Click on the link to view the [Procurement Community Wealth Building Charter](#).

## Climate Literacy e-Learning Course

The Climate Literacy eLearning Course has been designed to help public sector buyers understand the Climate Emergency challenge, and to appreciate how procurement activity can support net-zero aims for their organisation and Scotland as a whole. It reinforces current procurement policy and legislation that public bodies should use their public procurement spend to support climate and circular economy ambitions, and support Scotland's green recovery.

Suitable for both Procurement, Economic Development Colleagues and any colleagues with delegated purchasing authority, users are encouraged to register on the tools [website](#) and login to access the eLearning. This enables users to generate and download a certificate to confirm that they have completed the eLearning.

## 2) Data Analysis

Data Analysis is a feature within many of the Community Wealth Building Project streams and is undertaken to inform and guide decision making.

### Points to consider

- Your council spend:
  - within your council area, a wider regional area, within and out with Scotland
- Who are key suppliers to the council?
  - Can any of this spend be allocated to local companies, are you recording subcontracting?
- Are there suppliers in your local area who can service your needs?
  - How many companies in PCS are located in your council area?
  - How many businesses are based in your council area? In what sectors are these businesses?
- Are you making full use of local suppliers within sectoral and national collaborative frameworks?
- How much is spent by other local authorities in your council area?

### Sources of Data

The Community Wealth Building Data Note will set out a list of the data sources that have been utilised throughout the Project and may be useful in progressing community wealth building aims moving forward.

Click on the link to view the [Community Wealth Building Data Note](#)

### Spending Power Infographic

Designed to capture key council data covered by the Progressive Procurement workshop, providing the council with a current local economic snapshot to take-away to support community wealth building objectives.

Click on the link to view the [Spending Power Infographic](#)

The infographic will open in PowerPoint, and you will be able to enter your council specific data. Please note, data shown in this template is for illustrative purposes only.

### 3) Grow Local

This stream considers the implementation of Grow Local, a tool contained within the Scottish Procurement Information Hub, commonly referred to as “spikes” or “the observatory”. Assessing the potential for your organisation to increase economic activity within a local area or region, Grow Local can be used to help develop supply chain activity and encourage local companies to bid for an increased share of public sector spend on goods and services.

This report provides an options appraisal, detailing different ways in which the Grow Local tool can be used and helping to assess the viability of Grow Local as a tool to assist with community wealth building; specifically increased spend with businesses in the local area.

Click on the link to view the [Grow Local Opportunity Assessment Guide](#)

#### Additional Support and Information

Access to Grow Local can be arranged via Scottish Government. A Grow Local support site containing a user guide, Q&A and webinars can be accessed at [http://support.spikescavell.com/grow\\_local/index.html](http://support.spikescavell.com/grow_local/index.html)

### 4) Public Contract Scotland (PCS)

This stream focusses on a review of the usage of Public Contract Scotland (PCS), the national advertising website for public sector procurement in Scotland, within a council.

#### Data Analysis

Analysis of the data within PCS provides information regarding:

- the number of suppliers based within a council area
- breakdown of organisations by size (number of employees); micro 1-9 employees, small 10-49 employees, medium 50-249 employees and large over 250 employees
- breakdown of local suppliers by category

#### Points to consider

- Use of Prior Information Notices (PIN)
  - consistency of use

- are PINs shared between departments?
- Are PINs shared via external communication channels such as social media
- Who within the council uses PCS?
  - is this system used only by Procurement?
  - would there be value in all officers accessing PCS to search for local suppliers when requiring a quote(s)
  - training and monitoring requirements
- Processes for supporting new PCS registrations
  - supplier communication – to engage local suppliers, inform of any relevant upcoming opportunities and provide signposting to appropriate business support
- Supporting activity
  - there must be complimentary activity taking place across the council to encourage local suppliers to register on PCS
  - completion of a supplier finder profile is to be encouraged to improve the supplier’s visibility to buyers on the site

#### Additional Information and Support

Public Contract Scotland can be accessed at <https://www.publiccontractsscotland.gov.uk/>, where you will find helpful information in the form of User Guides and Videos.

## 5) Quick Quotes

This project stream aims to support Local Authorities to improve and maximise opportunities for increased local spend through contracts that have a value below Regulated Procurement levels. It includes a review of Council Contract Standing Orders, analysis of previous Quick Quote activity and a review of any additional applicable council processes or procedures.

#### Data Analysis

Through Public Contract Scotland, a Quick Quote Report can be produced. It is recommended that Quick Quote activity is analysed for a period of at least two years.

- How many businesses are operating in the council area vs how many are registered on PCS?
- How much council spend is allocated through Quick Quotes?
- How many Quick Quotes have been issued? Is this proportionate to council spend?
- How many local suppliers are being invited to Quick Quote? How many are successful?

#### Points to consider

- Are council standing orders being observed in relation to Quick Quotes?



- are the relevant number of local suppliers consistently being invited to quote?
- could inclusion of local suppliers in Quick Quotes be strengthened in the council's standing orders?
- are the thresholds that have been set for the use of Quick Quotes at the right level?
- could the Quick Quote functionality be utilised by more officers across the council?
- Do officers understand the link between Quick Quotes and Community Wealth Building?
  - is training / guidance required to provide context and link Quick Quote activity to the council's Community Wealth Building objectives?
  - is spending locally discussed as a priority with service areas?
- How does the council record and monitor spend under the Quick Quote threshold?
- Are other departments or service areas invited to input suggested suppliers to include in a Quick Quote?
- Use of the Quick Quote tool relies on suppliers being registered on PCS
  - it is important to ensure that there are complementary activities taking place to encourage local suppliers to register on PCS and complete a Supplier Finder profile if this functionality will be used
- Could Quick Quotes be used to enhance the size and range of businesses that the council contracts with?
- What are the barriers to local suppliers being successful in a Quick Quote?

## 6) External Partner Engagement

Community Wealth Building seeks to develop resilient, inclusive local economies to build and retain wealth locally. To maximise the creation of dense local supply chains and ecosystems of local enterprises, greater local employment and a larger and more diverse business base, the Council must work in partnership with its communities.

### External Stakeholder Mapping and Engagement

To fully inform the project, it is recommended that external relationship mapping is conducted. This is a tool to identify and map organisations out with the council, in relation to community wealth building aspirations. Providing a visual representation of stakeholders who are considered to be valuable partners in growing community wealth building aims, this tool will detail how they are connected and help to set the right priorities to ensure buy-in from key organisations. Consideration should be given to internal stakeholders and the relationships that may exist with external organisations across different departments.

Once mapped, completion of an engagement plan will help to formalise and progress activity.

As part of the Community Wealth Building Project, Scotland Excel engaged with a number of local Chambers of Commerce and the Supplier Development Programme (SDP), two key support organisations. Both were very interested in the community wealth building approach and were keen to support activity. It is recommended that you contact your local Chamber of Commerce and SDP to discuss partnership working as part of this stream.

Click on the link to view the [External Stakeholder Mapping and Engagement Template](#)

### Supplier Communications Templates

Designed to improve engagement with local supply markets, encourage local suppliers to work with the public sector and sign up to Public Contract Scotland, and to provide signposting to business support services, these supplier communication templates are available as a basic template for councils to tailor as required. Below you will find example email copy that can be customised as required.

Click on the link to view the [External Partner Engagement – Supplier Communications Templates](#)

### Scottish Government Sustainable Procurement Tools

These tools have been designed to help public sector organisations identify and address how they can optimise the economic, social, and environmental outcomes of their procurement activity. To access the tools, visit <https://sustainableprocurementtools.scot/> to login or register.

Here you can access:

- Flexible Framework Assessment Tool - to assess/record current level of performance and the actions required to embed good procurement practice to realise intended sustainable outcomes aligned to the Sustainable Procurement Duty
- Prioritisation Tool - designed to assist early-stage strategic planning and bring a standard, structured approach to the assessment of spend categories. This tool will identify key areas of focus based on markets and local priorities, which will help to pinpoint where to prioritise attention.
- Life Cycle Impact Map - Every product and service has a 'life cycle' or number of stages it goes through: obtaining raw materials; manufacturing and logistics; use of products or works and the delivery of services; re-use/re-manufacture and final disposal. Life cycle impact mapping (LCIM) is used to identify and assess the social and environmental impacts of these stages. LCIM is designed to be a gateway into the sustainability test assessment. It is recommended that users complete LCIM before undertaking sustainability test. LCIM is located within the sustainability test tool.
- Sustainability Test - designed to help embed relevant and proportionate sustainability requirements in the development of specific frameworks and contracts. It can be used in

isolation or by reference to the results of the Prioritisation Assessment, where undertaken.

Utilisation of the Scottish Government Sustainable Procurement Tools will help to inform improvement opportunities and aligns with organisational procurement strategies and annual procurement reports; compliance with the sustainable procurement duty in the Procurement Reform (Scotland) Act 2014; compliance with The Climate Change (Duties of Public Bodies: Reporting Requirements) (Scotland) Order 2015, The Equality Act 2010 (Specific Duties) (Scotland) Regulations 2012 and PCIP.

## Scotland Excel Community Wealth Building Service

This commissioned service will see Scotland Excel work with councils through targeted activity, in order to implement a Community Wealth Building approach and utilise economic levers to help their local economies to grow and thrive.

As a national centre of procurement expertise, Scotland Excel has been at the forefront of thinking and practice around improving how the public sector engages with local SME suppliers and markets, working with a range of partners and government on this area.

This service is flexible in terms of the number of activities undertaken, and project duration begins with Scotland Excel designing a bespoke package that is tailored to meet the needs of the organisation.

To find out more, [contact us](#)