

Effective Resident Participation in Procurement

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My Background

An early partnering contract – pre PPC 2000

Estate regeneration in Hackney

South East Consortium

Service Review and Definition

Consultancy work – market analysis ,procurement and delivery

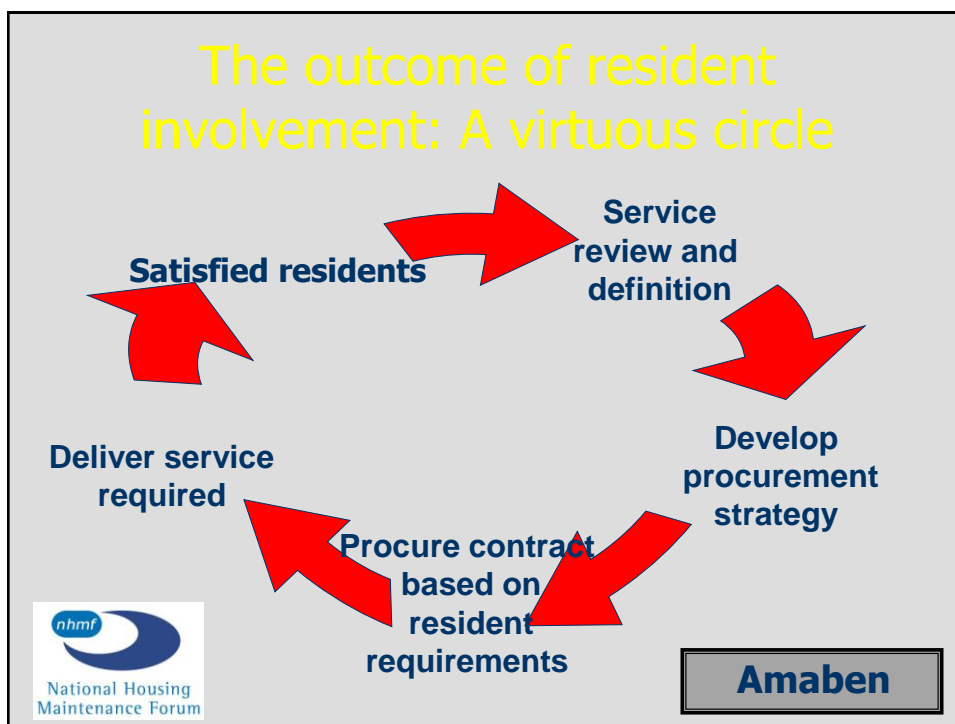


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Reasons for resident participation



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- ### Some not very good practice !
- Non 'meaningful' participation :-**
- ▶ **Un briefed residents**
 - ▶ **Falling asleep in interviews**
 - ▶ **Asking inappropriate questions**
 - ▶ **Unqualified to assess**
 - ▶ **Treated as a day out**
 - ▶ **'Speed assessing'**
 - ▶ **Subjective marking**
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Procurement Stages and Resident Involvement 1

Pre procurement

- | | |
|--|---------------|
| ▪ Service Review and Definition | YES |
| ▪ Market Analysis | NO |
| ▪ Best Practice Review | PARTLY |
| ▪ Procurement Strategy | PARTLY |



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Procurement Stages and Resident Involvement 2

Procurement

- | | |
|--------------------------------------|---------------|
| ▪ Request for participation | NO |
| ▪ Initial contractor briefing | YES |
| ▪ PQQ Assessment | PARTLY |
| ▪ Tender Evaluation | YES |
| ▶ Written | YES |
| ▶ Site visits | YES |
| ▶ Interviews | YES |



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Procurement Stages and Resident Involvement 3

Post Procurement

- **Mobilisation workshops** PARTLY
- **Core group** YES
- **Service Improvement Groups** YES



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Issues 1 - Nature of Contract /Service

- ▶ **Service /material being procured**
- ▶ **Geography**
 - **Move towards larger contracts covering greater areas**
 - **How do residents in the far flung areas get involved in procurement for a national organisation**



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Issues 2 – Procurement method and contract model

The procurement method will affect the amount of time that residents have to spend

- **Training**
- **Evaluating**



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Issues 3 – Recruiting Residents

Source	Benefits	Drawbacks
Standing panel	Knowledge	Overworked stale
Active residents	Enthusiastic and interested	Suitability Training required 'Same' group of residents
Asking for volunteers	Fresh faces	Training ,unknown quantity



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Issues 4—Legal

Competence to evaluate

Marking approach

Bias and conflict of interest

Consistency of panel members



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Issues 5— Training and briefing

As a minimum should cover :

- ▶ **Procurement process and legal requirements**
- ▶ **Understanding of the service/contract and key outcomes**
- ▶ **Evaluation – objective methods**
- ▶ **Equality and diversity issues**
- ▶ **Contract management processes**



Time: Ranges from ½ day to 50 hours

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Training -Merton Priory Homes

- ▶ **Organising meetings at times and venues that allowed full participation**
- ▶ **Provision of a glossary of terms setting out the meaning of technical language used in procurement**
- ▶ **Presenting information and reports in appropriate formats**
- ▶ **Regular update reports to resident groups**
- ▶ **Utilising a dedicated residents facility for evaluation of tenders with officers and consultants available to provide advice, support and guidance**
- ▶ **1 to 1 coaching and advice**
- ▶ **In total approximately 50 hours of training and support were carried out.**

'The Procurement Working Group totally supported the residents through the whole process well and never once made us look daft or stupid.

Most importantly for me they listened to and took our views on board.'



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Issues : 7 Time requirements – Repairs contract procurement

Stage	Days	Assumptions
Service definition	2	Workshops
Contractor briefing	1	Part of presentation team
PQQ Assessment	2	Assume 24 applied
Tender assessment	2	Assume 6 shortlisted
Interviews	1	
Site visits	2	3 per day
Total	10	



Issues 7 :Time requirements for some other procurement methods

Frameworks say 3 lots – Assume 24 per lot. 3x amount in first slide = 27days

Competitive dialogue – 2 more stages – dialogue and best and final offer

Assume 4 contractors at CD stage day each plus 4 at BAFO =17 days

NB Residents will have to be available at the specified times.



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Issues 8 – Communication

- ▶ **What is the final outcome ?**
- ▶ **Who will have the final say ?**



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Some other assessment methods

- ▶ **Specific presentations to residents**
- ▶ **Telephone interviews with nominated residents from another contract**
- ▶ **Online assessments remote dial ups**
- ▶ **Online service reviews**



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Some potential bear traps

- ▶ **Site visits**
- ▶ **Marking schemes**
- ▶ **Objectivity**
- ▶ **Confidentiality**



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Best practice

- ▶ **Resident engagement strategy developed as part of procurement strategy with clear programme and timescales**
- ▶ **Appropriate evaluation**
- ▶ **Training and briefing**
- ▶ **Communication -Fully informing residents of the outcome**



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Questions

- ▶ **What has worked for you?**
- ▶ **How much time do you demand of your residents ?**
- ▶ **Should tenants be rewarded ?**
- ▶ **Is there a case for common core practice ?**
- ▶ **Would a training and involvement toolkit be useful ?**



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Answers

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