London Borough of Bromley

The 14 Step Procurement Process

Matrix SPS

S1 – SProc.Net – Education & Support Services v2.3
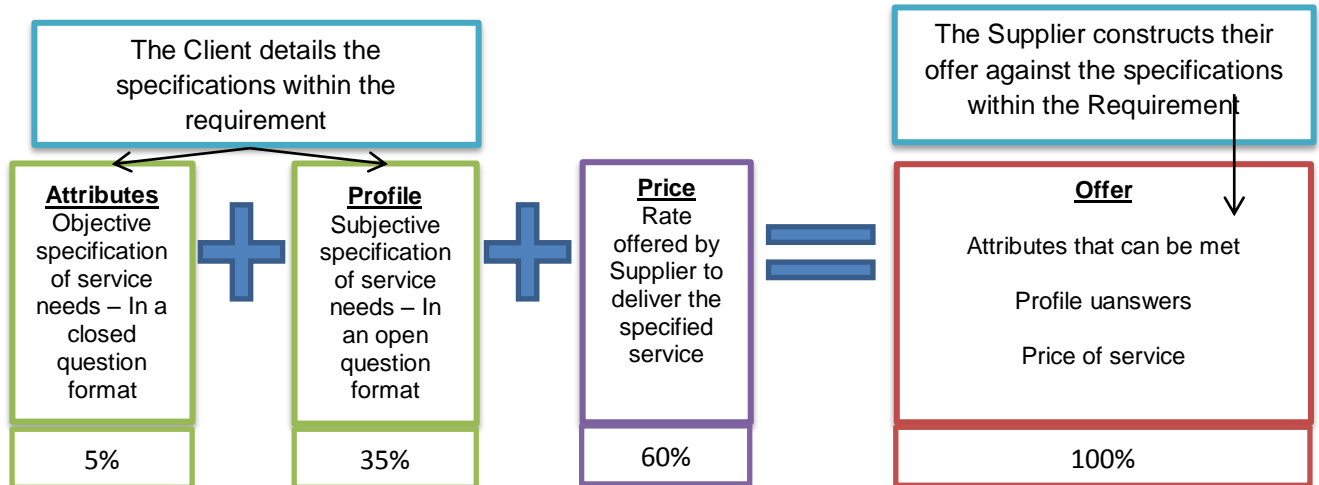
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Overview

The SProc.Net system is a sophisticated web based technology platform used by Clients and Suppliers to aid in the efficient and fair procurement of services through a 14-step process.

Requirements (Client service needs) and Offers (Supplier service bids) within the system are broken down into three separate metrics; Attributes, Profile and Price.

The Client details the specifications within the requirement			The Supplier constructs their offer against the specifications within the Requirement
Attributes Objective specification of service needs – In a closed question format	**Profile** Subjective specification of service needs – In an open question format	**Price** Rate offered by Supplier to deliver the specified service	**Offer** Attributes that can be met Profile uanswers Price of service
5%	35%	60%	100%

The Client inputs for what percentage these three metrics will account in the complete Offer score, which defines how the SProc.Net system will rank those Offers into a shortlist.

During the Requirement creation and distribution period the Client also sets out timescales that outline the subsequent periods where Offers can be reviewed and revised.

Requirement Client creation and distribution	**Open for Offers** Suppliers submit their offers	**Client Review** Client score shortlisted offers	**Bidding** Suppliers revise their offer's pricing to submit a best and final offer	**Client Decision** Client selects an offer & creates a Service Agreement	**Service Agreement** Service Agreement becomes active and delivery commences

Note:
➔ If the service start date is within 24 hours of Requirement distribution the above timescales will not apply. Supplier Offers will be evaluated when submitted and a Service Agreement (contract) created straightaway when a suitable Supplier is identified.
➔ Offers submitted are to deliver a service, not a specific person/worker.

Once all the review periods are complete the Client is presented with a final shortlist of Offers based on the Offer scores in relation to the three metrics (Attributes, Profile and Price).

They will then progress the top ranked Offer through to the Service Agreement (contract) step and this finalises the procurement process, after which the service delivery can commence.

This guide is a step-by-step walk through of the 14-steps within SProc.Net and explains how each step is fundamental to achieving efficient, fair and equitable service procurement.

Advertising

To advertise a public sector Client's recent services procurements to a public domain website

SProc.Net aggregates all Client Requirement and recent spend information and displays it on a demand site.

Suppliers can log onto the demand site and view all the active procurements and recent procurements for SProc.Net Clients

Suppliers input their search criteria regarding the type of service they wish to view and their service area

The demand site will then show Suppliers which Clients are procuring services relevant to them

Once a Supplier has selected a Client they can see all the information about their recent service procurements:

Services currently being procured – Suppliers can click into these for more details about open Requirements

Category of service broken down further

Information on yearly spend by category and a further breakdown available by month

The information displayed provides a transparent view of a Client's service procurement opportunities which can encourage Suppliers to join SProc.Net, Accredit and Enrol to a Client's supply chain.

Advertising also allows existing SProc.Net Suppliers to view potential opportunities in other service areas or with different Clients.

Example:

1) A Supplier reviews the demand site and notes they can supply one of the services recently procured by Client A

The Supplier Registers with SProc.Net, Accredits and Enrols to Client A

Supplier	→	Service 1	→	Client A

This Supplier can now Offer and bid for these services for Client A through the SProc.Net system

2) The Supplier then reviews the demand site again and notes that Client B also procures the same services through SProc.Net
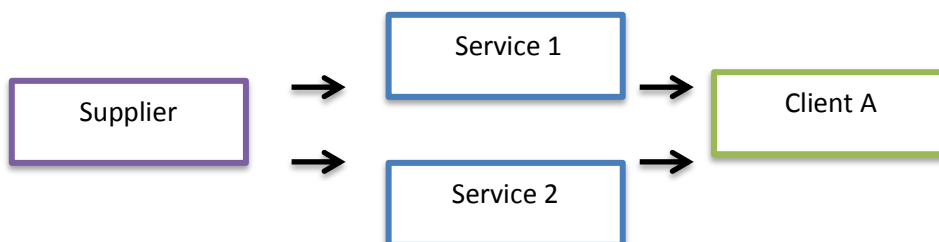
The Supplier Accredits and Enrols to Client B
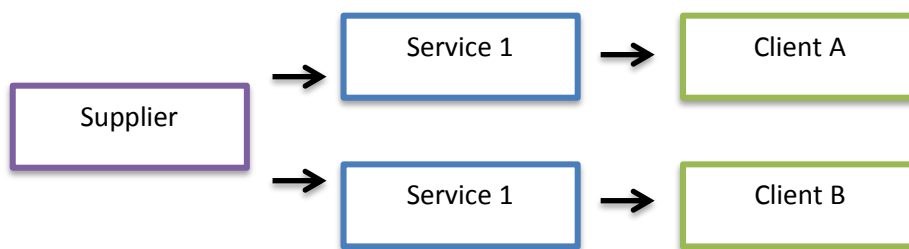
This Supplier can now Offer and bid for these services for Client A and B

3) The Supplier reviews the demand site and notes that Client A is procuring Service 2 through the system

The Supplier diversifies their business, Enrols into that service area with Client A

This Supplier can now Offer and bid for Service 1 and Service 2 procurements for Client A and they have grown their business directly in line with the market needs

Accreditation and Enrolment

Accreditation and Enrolment are the steps for a Supplier to join a Client's supply chain

Completed at a company level, Accreditation is an objective evaluation of a Supplier based on a defined set of criteria.

Completed at Supplier location level, Enrolment is a subjective evaluation of a Supplier based on a defined set of criteria.

These two process steps are completed within one wizard via the SProc.Net system

Suppliers must firstly register on SProc.Net to set up an account and get login details

Accreditation

The Supplier will be asked a series of closed questions that have a predefined list of answers, this allows the system to quickly identify if an Accreditation has passed or failed based on the Client's criteria:

All Suppliers are asked the same questions and this ensures all Suppliers that supply into the Client are evaluated in a fair way and they all meet the same base level criteria.

Upload Documents

The relevant documents will need to be uploaded for each of the document types before the Accreditation can be submitted.

Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm each one before submission.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	
Self Bill Agreement	Training Document.docx	14/01/2014		12/01/2015	
Signature Document					

Upload Optional Documents

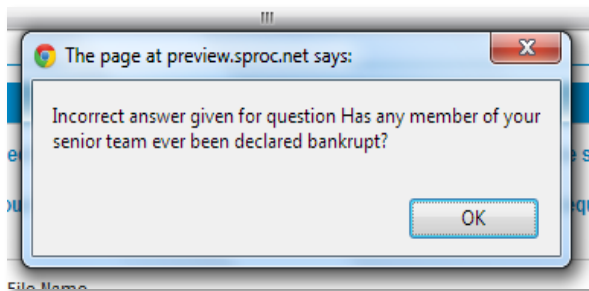If necessary, please upload all of the documents listed below.

Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm each one before submission.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
Employer's Liability Insurance Certificate					
Professional Indemnity Insurance Certifi					
Public Liability Insurance Certificate					

Cancel   Save

> A Supplier will also need to download, read, complete and upload any documents requested by the Client and the terms and conditions for using SProc.Net to supply services

The Accreditations questions are scored by SProc.Net initially and if any of the answers are incorrect the system will alert the Supplier, giving them the opportunity to revise their Accreditation:

The page at preview.sproc.net says:

Incorrect answer given for question Has any member of your senior team ever been declared bankrupt?

OK

Once submitted, the SProc.Net Wizard will take the Supplier through the Enrolment process.

Enrolment

Suppliers input further information about the services they want to deliver into the Client, by selection of their Service Category:

The Service Categories they wish to supply

The Supplier will then be asked a series of further open and closed questions, and will be required to upload additional documentation.

All Suppliers are asked the same questions and this ensures all Suppliers which supply into the Client are evaluated in a fair way and they all meet the same base level criteria.

Notes:

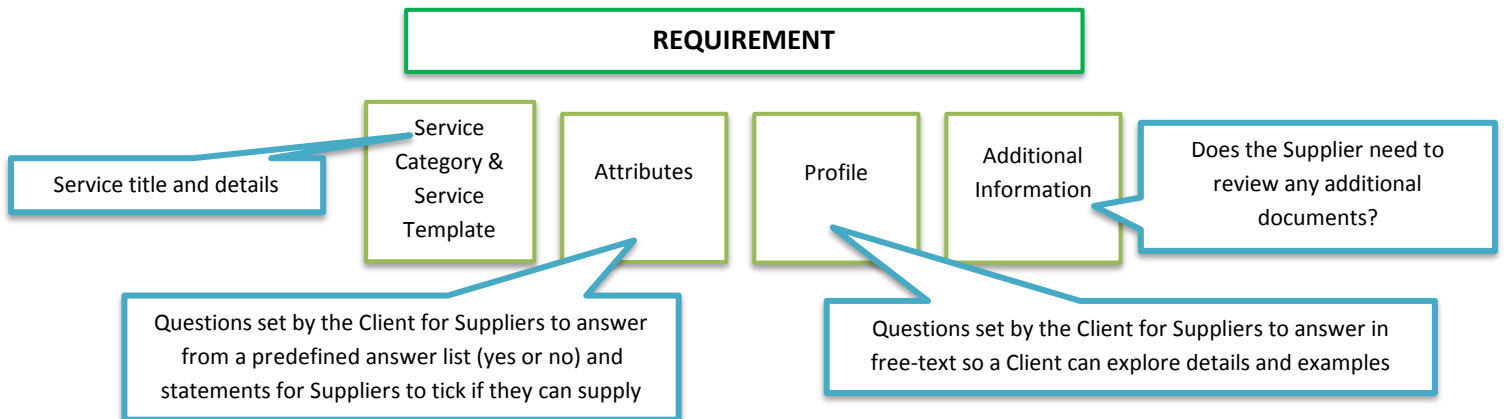➔ Once submitted, the Accreditation and Enrolment submission is reviewed by the Client and the Supplier will be informed if it was approved or rejected:

➔ **Approved** - The Supplier will be added to that Client's supply chain, to supply the selected service categories

➔ **Rejected** - The Supplier can review the reasons for the rejection, update their Accreditation and Enrolment submission and re-submit

Requirement Creation

The Client qualitatively details and specifies the service they are looking to procure

This is the first point in the procurement process.

Clients define their Requirement criteria through Profile and Attribute metrics and add additional information to ensure the Suppliers fully understand their service need.

REQUIREMENT			

Service title and details

Service Category & Service Template

Attributes

Profile

Additional Information

Does the Supplier need to review any additional documents?

Questions set by the Client for Suppliers to answer from a predefined answer list (yes or no) and statements for Suppliers to tick if they can supply

Questions set by the Client for Suppliers to answer in free-text so a Client can explore details and examples

The more detailed the Requirement the more accurate the Supplier's Offers will be.

The Requirement description field allows the Client to populate any additional service information and input a free-text service specification for the supply chain to review:

KS2 1:1 tuition in placement for SATs preparation

Yr6 literacy and maths 1 x 1 hour per week after school

20 weeks, excluding school holidays

Requirement description field

All Suppliers within the Client's supply chain, enrolled into the Requirement's service category, will receive this Requirement and all the information within it.
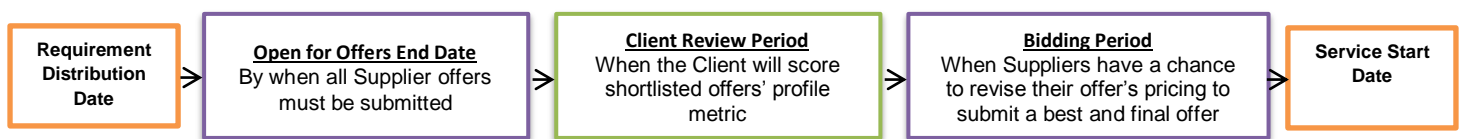
Requirement Distribution

The simultaneous circulation of a Client Requirement to all the Suppliers within their supply chain who stated they could supply this service category during the enrolment process

The Client assigns weightings to the three metrics within an Offer:

Attributes Objective specification		**Profile** Subjective specification		**Price** Rate offered by Supplier		**Offer** Supplier bid
5%	**+**	35%	**+**	60%	**=**	100%

The client defines the deadlines within the rest of the process:

Requirement Distribution Date	**Open for Offers End Date** By when all Supplier offers must be submitted	**Client Review Period** When the Client will score shortlisted offers' profile metric	**Bidding Period** When Suppliers have a chance to revise their offer's pricing to submit a best and final offer	**Service Start Date**

The Client also sets the number of Offers they want within their shortlist (during the Client Review Period a Client will only score the shortlisted Offers, not all the Offer that have been submitted).

Once complete, the Requirement is simultaneously sent out to the relevant supply chain so all Suppliers receive the same information at the same time. Suppliers receive an email notification when the Requirement is distributed.

Notes:
- ➔ No timescales will be set if the Requirement start date is within 24 hours of Requirement Distribution
- ➔ The process will follow Bromley Council's emergency process which allows Offers to be reviewed by Bromley Council immediately after submission from the Supplier

Offer

An Offer is a submission from a Supplier towards the specification of a Requirement, including a price quotation to deliver the services required

Suppliers review a Requirement and the specifications outlined by the Client to establish if they can provide the service as specified.

At this stage a Supplier can send a Requirement message to the Client to clarify further details.

These messages will be displayed anonymously on the Requirement so that all Suppliers will still have the same amount of information.

Suppliers then accept or reject the Requirement, indicating to the Client whether they are going to make an Offer.

Offers are structured around the three metrics: Attributes, Profile and Price.
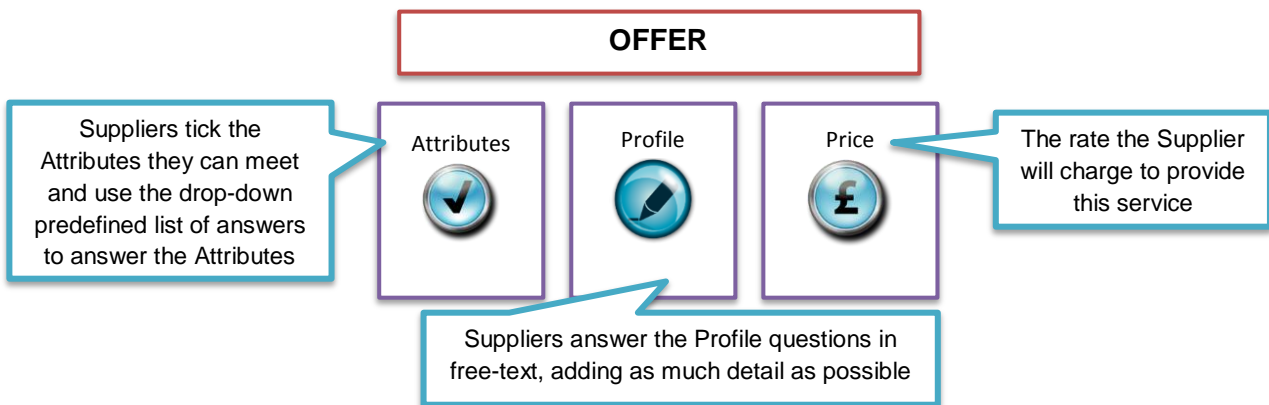
The standardised Offer creation and submission process ensures all Suppliers promote their services in a clear and simple way.

Note: Offers submitted are to deliver a service, not a specific person/worker.

Once submitted, SProc.Net will score the Offers on their Attribute and Price metrics and create a shortlist (number of Offers within the shortlist is defined by the Client).

Offer	Attribute Score 5%	Profile Score 35%	Price Score 60%	Total Score 100%	Shortlist Ranking
B	5		57	62	1
D	1		60	61	2
A	4		54	58	3
C	3		50	53	4

Suppliers will receive a notification informing them whether their Offer has been shortlisted.

During the Open for Offers Period Suppliers can revise their Offer pricing, potentially increasing their pricing score and changing their ranking position.

Client Review

A review of the subjective elements of the shortlisted Offers

Once the Open for Offers Period ends, the Client will be able to review their shortlist of Offers.

Within this step the Client will score the Profile answers within the Offers to complete the scoring process.

The answers to the Profile questions cannot be scored by the system because they are subjective.

The Client is presented with the shortlist (as above) that has been calculated by the system and ranked on the Offers' Attributes and Price scores.

Offer	Attribute Score 5%	Profile Score 35%	Price Score 60%	Total Score 100%	Shortlist Ranking
B	5		57	62	1
D	1		60	61	2
A	4		54	58	3
C	3		50	53	4

The Client then scores the Profile answers submitted:

Offer	Profile Score 35%
B	28
D	16
A	34
C	25

The number of Offers within the shortlist was defined by the Client during Requirement creation

SProc.Net will then re-calculate the shortlist using all three metrics:

Offer	Attribute Score 5%	Profile Score 35%	Price Score 60%	Total Score 100%	Previous Shortlist Ranking	New Shortlist Ranking
A	4	34	54	92	3	1
B	5	28	57	90	1	2
C	3	25	50	78	4	3
D	1	16	60	77	2	4

Once the Client Review Period ends (timescales set by Client during Requirement creation), Suppliers will receive communication of their ranking now that the Profile metric has been scored.

Notes:

➔ The Client Review period will not take place in the same format under Bromley Council's emergency Requirement process, Offers will be reviewed individually by Bromley Council immediately after Offer submission

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Supplier Review

An opportunity for the shortlisted Suppliers to revise their Offer pricing

The shortlisted Suppliers now know their ranking within the shortlist and the Supplier Review Period gives them the opportunity to revise their Offer's price and submit a best and final Offer.

By revising the Offer's price, Suppliers may increase their Offer's score and change the Offer's ranking within the shortlist.

Offer	Attribute Score 5%	Profile Score 35%	Price Score 60%	Total Score 100%	Previous Shortlist Ranking	New Shortlist Ranking
B	5	28	60	93	2	1
A	4	34	54	92	1	2
C	3	25	50	78	3	3
D	1	16	59	76	3	4

Suppliers can revise their Offer's price as many times as they wish within the Supplier Review Period.

SProc.Net will notify a Supplier if their Offer's ranking position changes.

At the end of the Supplier Review Period, the Client is presented with the final shortlist of Offers.

Notes:

➔ The Supplier Review period will not take place within Bromley Council's emergency Requirement process

Service Agreement

A contract between the Supplier and the Client binding the Requirement specification, Offer information and any additional information

This is the last point in the procurement process.

The Client will create a Service Agreement with the top ranked Offer from the final Offer shortlist.

This ensures that all parties are clear on the service that is to be delivered.
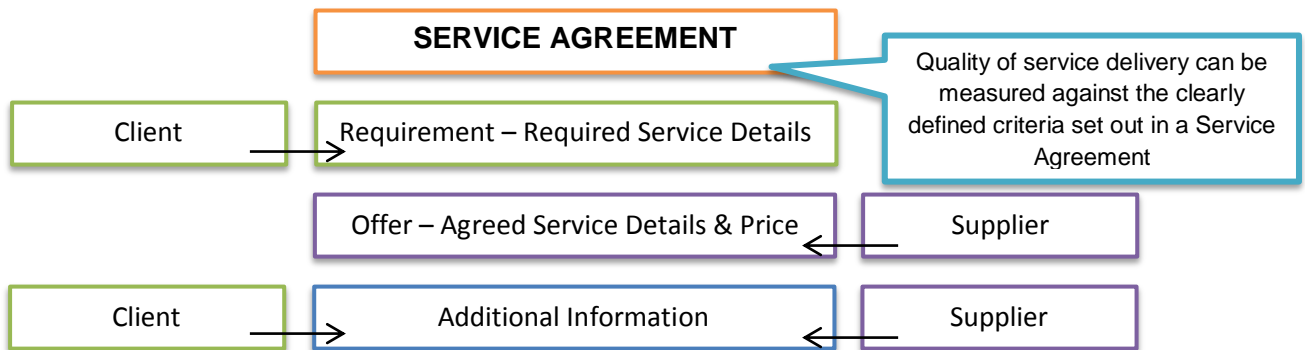
Once created, the Client will send a Service Agreement to the Supplier for review.

The Supplier will then accept or reject the Service Agreement:

Accepting – Makes the Service Agreement active, once given final Client approval, and will trigger communication to all other Suppliers that their Offers were unsuccessful.

Unsuccessful Suppliers can then review their Offer's score compared to the winning Offer ensuring the process remains transparent and fair.

Offers	My Offer - OF142069	Winning Offer 1
Rank	3	1
Attribute Score	100.00	100.00
Price Score	99.46	99.29
Rank Score	20.00	60.00
Weighted Attribute Score (20%)	20.00	20.00
Weighted Price Score (40%)	39.78	39.72
Weighted Rank Score (40%)	8.00	24.00
Overall Score	67.78	83.72

Offer Rank Analysis Report

Rejecting – Informs the Client that the Supplier is now unable to provide the service as set out and the Client will then create a Service Agreement with the next ranked Offer within the shortlist.

Once accepted by the Supplier a Service Agreement will return to the Client for final approval.

One approved the Service Agreement will become 'Active' and service delivery can commence.

Client		Supplier		Client		Client & Supplier
• Creates a Service Agreement contact with the top-ranked Supplier Offer	→	• Reviews the Service Agreement and Accepts / Declines	→	• Reviews the Service Agreement and completes final Approval	→	• Service Agreement becomes 'Active' and service delivery commences
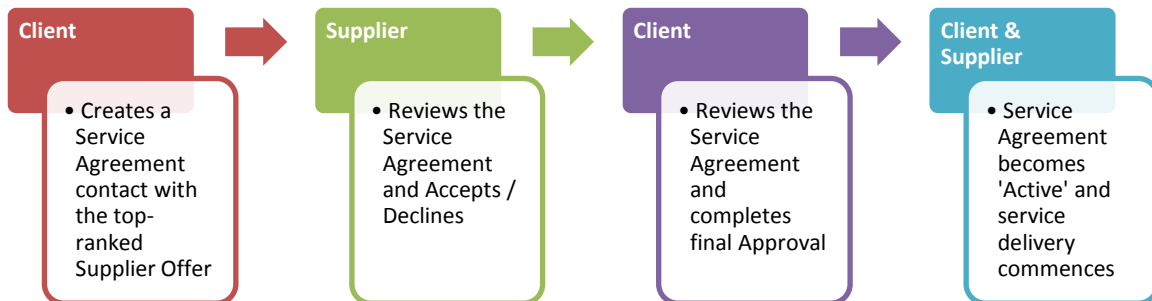
Change Orders can be added to a Service Agreement (providing the other party accepts/approves the adjustment) and are displayed within the Service Agreement to ensure it always represents the latest agreed scope of service which reduces scope creep.

Service Receipts

A Supplier-raised bill for services delivered as part of an active or recent Service Agreement

The first step in the payment process.

Once a service is delivered (in part or in full) a Service Receipt is generated by the Supplier on SProc.Net.

The system ensures the Supplier bills the Client according to the price parameters set out in the Service Agreement.

This Service Receipt is then sent to the Client for review and validation:

The Client will then approve or reject the Service Receipt.

Approved – Triggers the automatic Invoice, Self-Bill and Payment steps
Rejected – The Service Receipt will be return to the Supplier with feedback, this can then be amended and re-submitted

Service Receipt adjustments can also be raised to rectify any errors from previous invoices.

Invoice

A weekly consolidated invoice to the Client from Matrix SPS for all approved Service Receipts

SProc.Net consolidates all approved Service Receipt data into one Invoice.

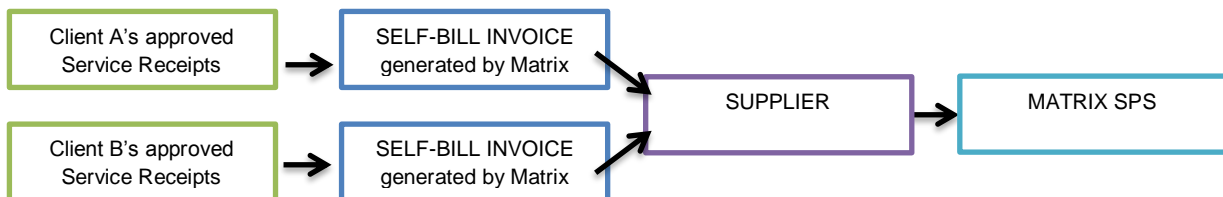This invoice is then issued to the Client in the form of a VAT invoice.

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┌──────────────────┐   ┌──────────────────┐   ┌──────────────────┐
│ Supplier A's     │   │ Supplier B's     │   │ Supplier C's     │
│ approved Service │   │ approved Service │   │ approved Service │
│ Receipts         │   │ Receipts         │   │ Receipts         │
└──────────────────┘   └──────────────────┘   └──────────────────┘
           ↘                    ↓                    ↙
        ┌──────────────────────────────────────────┐
        │                INVOICE                    │
        └──────────────────────────────────────────┘
                           ↓
        ┌──────────────────────────────────────────┐
        │                CLIENT                     │
        └──────────────────────────────────────────┘
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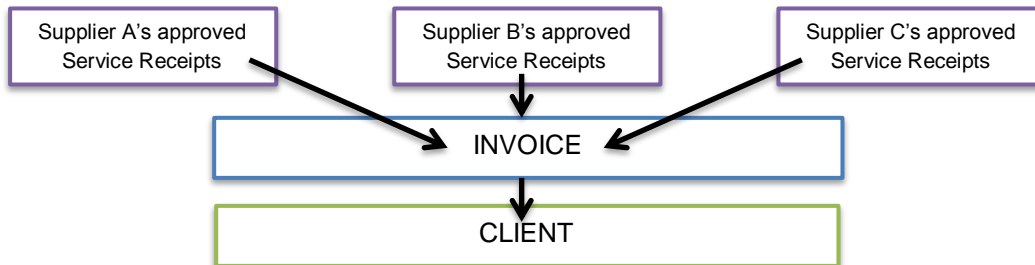
This process means that instead of paying each Supplier individually, a Client simply has to pay Matrix SPS one lump sum payment and Matrix SPS pays the Suppliers individually.

Self-Bill

An automatically-generated invoice produced by the system on behalf of the Supplier

Matrix SPS produces a Self-Bill invoice from the Supplier to Matrix SPS as the payment agent of the London Borough of Bromley, billing them for services as per approved Service Receipts.

```
┌──────────────────┐   ┌──────────────────┐
│ Client A's       │ → │ SELF-BILL INVOICE│
│ approved Service │   │ generated by     │ ↘
│ Receipts         │   │ Matrix           │   ┌────────────┐   ┌────────────┐
└──────────────────┘   └──────────────────┘   │  SUPPLIER  │ → │ MATRIX SPS │
┌──────────────────┐   ┌──────────────────┐   └────────────┘   └────────────┘
│ Client B's       │ → │ SELF-BILL INVOICE│ ↗
│ approved Service │   │ generated by     │
│ Receipts         │   │ Matrix           │
└──────────────────┘   └──────────────────┘
```

This step completes the invoice loop without Suppliers having to complete any administration and Matrix SPS then pays Suppliers for the services they have delivered.

Payment

Clients pay a lump-sum to Matrix SPS on a weekly basis as per the consolidated Invoice issued

Matrix SPS pays Suppliers as per the Self-Bill invoices

Client	£	Matrix SPS	£	Supplier

For Clients, one lump-sum payment per week is less administrative work and effort.

Suppliers do not have to maintain an extensive credit control function to chase multiple payments.

Audit and Supplier Management

The management and audit of Supplier compliance and quality performance

Suppliers must be continuously audited for compliance with the Client's Accreditation and Enrolment criteria.

The system reviews Supplier compliance documentation and generates notifications when these documents are nearing expiry.

For example, if the Insurance certificate uploaded by a Supplier during Accreditation were due to expire the system would notify them and they would need to upload a new certificate

Clients are also able to review the historical service quality of a Supplier and take actions if necessary.

The Client will also collect data about a Supplier during the Service Receipt evaluation process, completed during the Service Receipt step at the end of a Service Agreement:

Supplier evaluation

Client evaluation questions

These questions will appear on the final Service Receipt of a Service Agreement.

Action can be taken to remove a Supplier from a Client's supply chain if they fail to meet the Client's defined standards.

Need More Support?

The contact details for your SProc.Net system support are below:

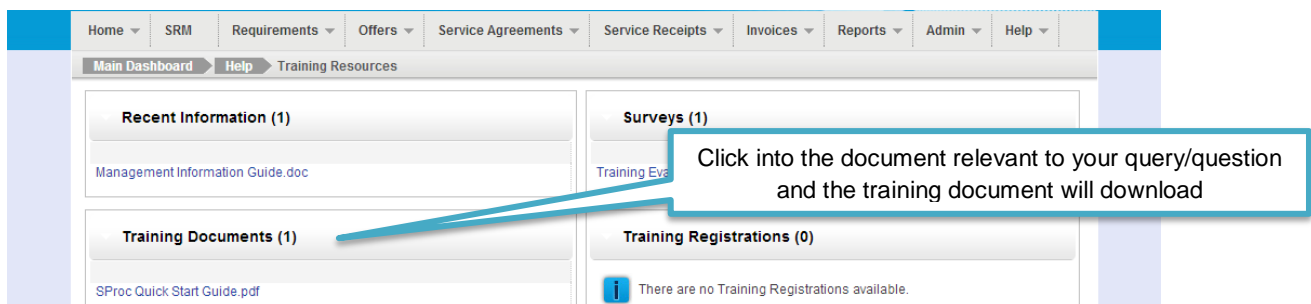**Supplier Phone Number: 0871 474 0332**

If you need more support regarding anything detailed in this guide, please use the help functions available within your SProc.Net account:

Click into the 'Help Library' icon on your homepage
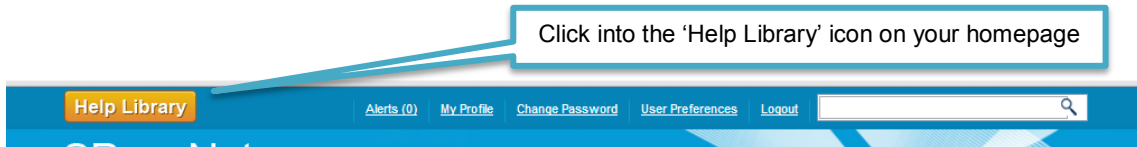
You will be taken to our Help Library where you have a number of different ways of finding the answer to any questions you may have:

a) Click here to view all training resources

b) Click here to raise a Query
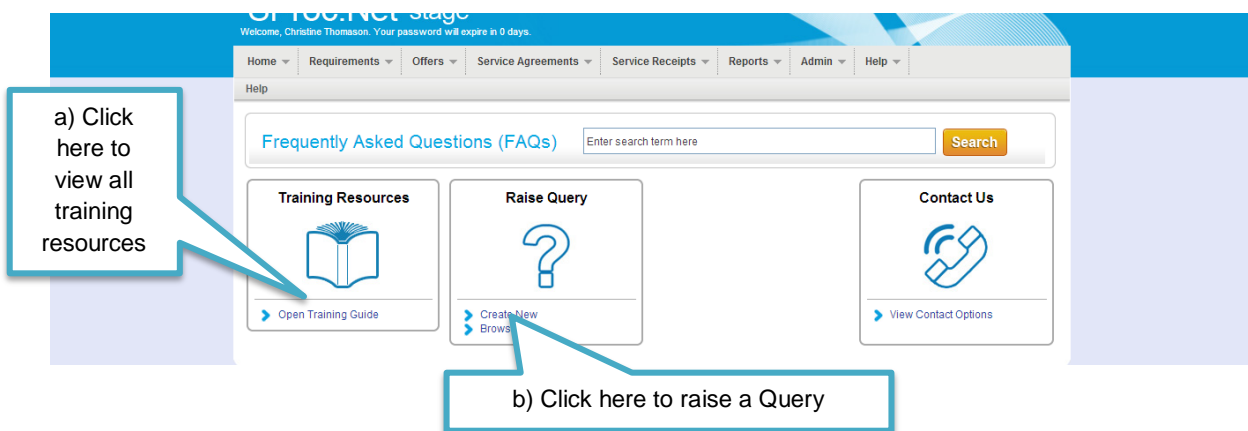
a) Training Guides / Documents / Videos are available for you to view and use as support:

Click into the document relevant to your query/question and the training document will download

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b) Queries can be raised to the Matrix SPS Account Management team:

Input all the details of your query/question as instructed

Upload any files relevant to your question using the icon

Click 'Save' to send

➔ A member of the Matrix SPS Account Management team will be assigned your Query and they will respond to you with an answer.

➔ Each individual Query has its own unique reference number which will detail the question and the response.

➔ You can look through all the Queries you have raised and any that have been raised by members of your team (details of who is in your SProc.Net team can be found in your profile in the 'My Team' section) by clicking into the 'Browse' link under the Queries section of the Help Library.

All Queries that have been raised by you or your team

All these support options are also displayed on your SProc.Net homepage with your helpline phone number: