

Appendix 2

Example skills / training matrix

Name	Position	Date
Bill Hawkins	Senior Procurement Officer, XXXX Department	5 April 2004

Required competency level	Actual competency level	Training requirements
<p>1 Procurement policy context</p> <p>Awareness of procurement context and associated implications. Compliance with pre-determined rules, accompanied by an understanding of the risk of non-compliance. Through experience has the knowledge and understanding of when to seek advice.</p>	<p><i>General awareness of the 'rules' as he understands them, but unclear as to meaning of sustainable development and implications of fair employment issues.</i></p>	<p><i>General awareness of Standing Orders, and introduction to sustainability etc.</i></p>
<p>2 Strategic Awareness</p> <p>Awareness of strategic issues, and ability to identify circumstances where value and risk require a strategic approach to be taken. Enough experience of strategic procurement to know when to seek advice. Aware of strategic importance of sustainable procurement and electronic commerce.</p>	<p><i>Does not feel he is in a position to influence strategic thinking of authority. High awareness of electronic commerce issues.</i></p>	<p><i>Awareness of strategic procurement issues.</i></p>
<p>3 Markets</p> <p>Basic knowledge of markets and products, with ability to apply basic procurement processes in search of best value. Some commercial focus, with enough experience to know when to seek advice.</p>	<p><i>Good awareness of markets and considerable experience in application of basic procurement processes.</i></p>	<p><i>None</i></p>
<p>4 Processes</p> <p>Able to apply basic procurement processes to routine procurement situations. Some experience of negotiation, but requires support. Experienced enough to know when to seek help or advice.</p>	<p><i>Considerable experience in basic procurement processes but would like update on current initiatives.</i></p>	<p><i>Awareness of current procurement initiatives.</i></p>

Required competency level	Actual competency level	Training requirements
<p>5 Contract Management</p> <p>Able to monitor contractor performance against predetermined milestones, and to identify when corrective action needed. Requires assistance to negotiate improvements.</p>	<p><i>Good ability, but would like to see more on performance indicators 'from the top'.</i></p>	<p>None</p>
<p>6 Finance and Accounting</p> <p>Limited appreciation of financial accounts/ appraisal, and of supplier cost bases. Enough knowledge to know when further advice may be necessary.</p>	<p><i>Considered to have little, but sufficient knowledge of financial issues</i></p>	<p>None</p>
<p>7 Inventory Management</p> <p>Appreciation/familiarity with basic stock control. Able to operate stock control systems in line with pre-determined criteria e.g. re-order levels. Able to recognise where advice is required.</p>	<p><i>Competency not required in this post.</i></p>	<p>None</p>
<p>8 ICT and e-commerce</p> <p>Ability to operate basic ICT and e-commerce tools, coupled with an appreciation of how to exploit them to support.</p>	<p><i>Has been the catalyst in the department to the adoption of various ICT tools.</i></p>	<p>None</p>
<p>9 Marketing/customer management</p> <p>Understands and commits to a positive, helpful customer focussed approach. Knows when to seek support.</p>	<p><i>Always works with the client in mind.</i></p>	<p>None</p>
<p>10 Management (self)</p> <p>Makes good use of time, is flexible. Aware of the need to plan. Limited ability to be creative, limited awareness of risk and its implications. Possesses basic numeracy and communicates well. Limited influencing skills, but able to be a good team player.</p>	<p><i>Good planning and time management skills. A good team player.</i></p>	<p>None</p>

Required competency level	Actual competency level	Training requirements
<p>11 Management (team)</p> <p>Aware of the need to support others in a helpful, flexible way. A good team player who can effectively manage staff. Able to work with others as part of a team. Aware of the need to support management in ensuring that an effective team is developed to deliver the needs of the business plan. Able to identify staff conflicts and work with management to resolve.</p>	<p><i>A good team player, but often felt let down by others.</i></p>	<p><i>Teambuilding</i></p>
<p>12 PFI/PPP and strategic partnering</p> <p>Some awareness of PFI/PPP policy and practice and strategic partnering. Able to follow pre-determined procedures. Understands risks of non-compliance. Sufficiently knowledgeable to recognise when to seek advice and other support.</p>	<p><i>Awareness of general issues, but no experience of such agreements.</i></p>	<p><i>Overview of PFI/PPP and strategic partnering agreements</i></p>
<p>13 Gateway review process</p> <p>Limited awareness of gateway review process.</p>	<p><i>No awareness or experience.</i></p>	<p><i>Introduction to gateway process.</i></p>
<p>14 Project Management</p> <p>Basic understanding of project management and the formulation, key components and use of the project plan.</p>	<p><i>Full understanding of processes and requirements.</i></p>	<p><i>None</i></p>
<p>15 Construction and Property</p> <p>Able to understand the key issues of each subject heading and their implications for the client department. Understands the current health and safety Legislation and its effects on projects.</p>	<p><i>A good understanding of most issues, but feels update on new initiatives necessary.</i></p>	<p><i>Awareness of current procurement initiatives.</i></p>

This matrix is based on 'Skills Framework for Procurement and Contract Management in Local Government' (IDeA) to which reference should be made for full details.

Required competency level	Actual competency level	Training requirements
<p>16 ICT Projects</p> <p>Communicate ideas and work within multi-functional teams with minimum supervision and infrequent reference to others. Have a methodical and organised approach to work and demonstrate ability to learn new skills and apply newly acquired knowledge. Basic awareness of the importance of ICT, the role that procurement should play and the need for procurement to be involved at an early stage.</p>	<p><i>Excellent awareness. Has led teams on ICT projects within the department.</i></p>	<p><i>Possible secondment to strategic unit to enhance development</i></p>
<p>17 Social Care Contracts</p> <p>Able to understand the key issues of each subject heading and their implications for the social services department, service users, carers and advocates.</p>	<p><i>Not relevant to current post.</i></p>	<p><i>None</i></p>