

Consultancy Procurement Plan

How to Use: The Consultancy Procurement Plan must be completed before engaging any external consultants. Before completion consideration must be given to using internal resources and expertise. These resources and expertise may not exist within your own service area or directorate so please consult with colleagues in other directorates and even within other North Wales Councils before engaging external resources, The plan must be authorised by your Head of Service. In terms of the procurement route to follow please refer to the Council's Contract Procedure Rules or seek advice from the Corporate Procurement Unit. A copy of the completed procurement plan must be forwarded to the Corporate Procurement unit to enable a pan Council awareness of external consultancy for relevant reporting.

**Directorate &
Service Area**

**Commissioning
Manager**

**Category of
Consultancy**

*See definitions
overleaf.*

**Statement of
requirements**

*i.e. project
description, specific
expertise and skills
required, estimated
length of
engagement,
previous experience
etc*

**Objectives of the
engagement.**

*i.e. outcomes and
outputs expected,
wherever possible
these should be
measurable.
Skills and knowledge
transfer must be
included in
objectives.*

Business Case for engagement of external consultants
i.e. have we considered internal resources, partner resources etc

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Budget and Procurement Route
i.e. The budget must be identified in advance of the engagement and the procurement route as per CPR's and agreed with the corporate procurement unit

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The approver is responsible for the procurement of the external consultancy services. They will also ensure that a work plan is agreed and monitored with the consultant and that all identified outputs and outcomes as identified above are met. The approver will also ensure that staff work alongside the consultant to ensure appropriate knowledge and skills transfer.

	Name & Position	Date
Approved By		

Consultant Category Definitions

1. Retained consultant, e.g. advisors to the pension fund
2. Retained for special projects, longer term
3. Consultants for specific processes, e.g. consultants appointed to look at the voids process in Housing, consultants appointed to advise on a new technology
4. Consultants employed for specialist services such as training, e.g. social services trainers