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Solent Road
Havant, Hampshire
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**PROGRAMME
FOR
COMMERCIAL AND COMMISSIONING
TRAINING
2010/11**

Introduction

Excalibur has a strong track record of supporting organisations within both the public and voluntary sectors with commercial, commissioning and procurement services. These services range from the provision of advice, guidance and support to the management and delivery of projects and outsourced services.

As an organisation we are strongly committed to working with our customers to develop their own skill sets in these areas, and as part of this commitment we have developed this training programme specifically to provide commissioning staff (and all those involved in commissioning) with the skills and competencies they need to meet their organisation's needs in today's challenging environment.

Each of the workshops or seminars that comprise this training programme is designed to address commissioning training needs, and to provide staff with the tools they need to both enhance their skills and to apply them practically in their workplace.

The training programme will run for two years to enable staff members to develop new skills and techniques in line with their organisation's longer-term business strategy.

All of the courses in the training programme have been developed to suit the needs of the Probation sector, but many also use relevant case studies from other sectors to demonstrate innovative approaches to addressing commissioning challenges. The course material is a mixture of pre-reading, seminars, workshops and work-based projects, but all are interactive and use material relevant to supporting the development of skills and understanding in a team environment.

Good training programmes are those that include a mix of intensive workshop or seminar sessions run by recognised experts, followed by on-the-job practice of lessons learned during the training. Usually this means staff practicing in their own working environments to develop their skills further, but where appropriate work-based exercises will be included to support this process.

Whilst the programme focuses on commercial and commissioning skills for staff wanting to develop their skills to suit today's wider and more challenging commissioning environment, we also recognize that there is a need to enhance the awareness of internal stakeholders that operate outside of the commissioning environment, as they need to understand the basics of the principles that their commissioning colleagues will be adopting.

Accordingly a series of seminars designed specifically for senior managers, directors, board members and other stakeholders have been included within the programme. These are designed to develop an understanding of the commissioning concept, the skills and competencies required to support it, and the opportunities and risks associated with the process. These seminars will also demonstrate that all areas of an organisation have a part to play in developing commissioning strategies.

The programme consists of modules made up of key, best-practice commissioning skills together with additional modules that look specifically at market flexibility and innovative thinking. These focus on:

- **Sector trends and market flexibility** - the importance of developing a good understanding of your sector and the environment in which you are commissioning, the dynamics that effect changes to the market and how they can and should influence your commissioning decisions.
- **Commissioning for innovation** - how innovation can be used to deliver continuous improvement and business flexibility in the delivery of services within a commissioning environment.
- **Undertaking a strategic needs assessment** - what are the aims and goals, how is it achieved and what should be included?
- **Prioritisation of outcomes** - how is this achieved? Identifying drivers & barriers, timing, managing deliverables and expectations.
- **Planning and designing services** - option analysis & appraisal: What are the sourcing options? How mature is the market? How will the service be delivered?
- **Service delivery and monitoring** - how commissioning, through service improvements, re-engineering and innovation, should continue to influence service delivery throughout the life of the contract.

There are four levels at which staff can enter the training programme.

Level 1 - Foundation

The entry level - designed for staff requiring a basic understanding of commissioning. It is aimed at staff who will be employed on commissioning tasks, or who need a basic understanding of the principles and approach.

Level 2 - Intermediate

Designed for individuals who require a level of understanding and expertise that goes beyond the basic concepts and principles of commissioning.

Level 3 - Advanced

This builds on Levels 1 and 2 but is designed for individuals who have gained experience in process-driven commissioning activities, but now require more specialised skills and an understanding of the wider commissioning environment.

Strategic-Level Seminars

These have been specifically designed for stakeholders such as senior managers, directors and board members. It aims to develop a high-level understanding of the principles and concepts, and to develop the skills to identify key opportunities and major risks. It also explores ways of developing dialogues in the wider commissioning arena.

Module Descriptions

Level 1 - Foundation (3 Modules):

CF01: Introduction to Commissioning. *1 Day workshop*

This module provides an overview of the fundamentals of commissioning. It develops an understanding of what commissioning is; how it is different to the procurement process, and outlines the principles of the commissioning cycle. It will form the basis of further modules as delegates progress through the training programme, providing a solid foundation for future courses.

CF02: Commissioning in the public sector – understanding market dynamics. *1 Day workshop + work based assignment*

This module focuses on the role of public sector organisations, the influence of both internal and external dynamics and how they can affect commissioning decisions. It builds on the principles of Course CF01 by strengthening the delegates' understanding of the environment in which their own organisations' operate and provides a foundation for ensuring flexibility is considered in the commissioning decision.

The work-based assignment will require delegates to map their own organisations' activities, influencers, drivers and barriers which will increase both their individual knowledge and their ability to influence the understanding by senior level staff of commissioning issues.

CF03: Commissioning for Innovation. *1 Day workshop + work based assignment*

This module looks at innovation and how the current economic climate makes it a vital factor in commissioning decisions. It is designed to develop thinking and skills by providing techniques for identifying innovative ideas that could provide a more dynamic way of delivering services with fewer resources. It builds on the previous modules and provides a good foundation for delegates to move to the next level of the programme.

The work-based assignment requires the delegates to begin developing innovative thinking in their own organisations by focusing on a core service element and using the techniques they have learned to test for innovation.

Level 2 - Intermediate (5 Modules):

CI01: Commissioning - Undertaking a Needs Assessment and Challenging Delivery Models.

2 Day workshop + work based assignment

The commissioning decision is driven by the outcomes of a needs analysis - which is a set of activities used to assess current services compared with the organisation's future needs. Good commissioning should also take a challenging look at the current service delivery model used by an organization, which should reveal many opportunities for improvement.

This module will first develop a delegate's understanding of the process for undertaking a needs analysis including:

- obtaining baseline data,
- gap analysis,
- predictive financial and operational modelling
- stakeholder engagement.

It will focus on techniques for gathering information to help shape services and the need to ask questions that ensure all views are considered.

This module will also provide delegates with techniques and tools that can be used to identify alternative delivery models, and how to assess their applicability in commissioning services. Delegates will learn about delivery models being used by other sectors, the resource implications of different delivery models, and how to develop effective models for service delivery.

The work-based assignment will require delegates to use the tools and techniques learned in the module to undertake a mock challenge to a service delivery model currently being used by their organisation.

This module builds on the foundation level courses by further developing the understanding of this important element of the commissioning cycle and the need for flexibility and innovation when undertaking needs assessments.

CI02: Stakeholder Engagement - communication and consultation.

2 Day workshop + work based assignment

Stakeholder engagement is an umbrella term used to describe a range of communication activities for working with individuals, groups or organisations directly or indirectly affected by your own organisation's activities. It is a means of ensuring that their views, concerns and ideas are both considered (and seen to be considered) in the commissioning decision and throughout the life of the service.

This module will enable delegates to understand the importance of this process by providing techniques to help with:

- stakeholder identification and analysis,
- the disclosure of information,
- consultation,
- negotiation
- partnership management.

It will also look at how to manage stakeholder grievance and reporting. The work-based assignment will require delegates to undertake a desktop stakeholder consultation exercise for a selected service within their own organisation.

CI03: Prioritising Outcomes.

1 Day workshop

A good needs assessment will often provide a detailed list of desired outcomes that should be considered in making the commissioning decision. However given that it is unlikely that all of these outcomes will be achievable in the timeframe available, commissioners need to prioritise outcomes and select those that are essential to the delivery of the service(s) required.

This module will provide delegates with tools and techniques that can be used to help prioritise outcomes, and focuses on the identification of primary and secondary outcomes. It discusses the use of evidence for important comparisons (such as quality or magnitude of effect) and how it can be used to facilitate the prioritisation process.

CI04: Planning and Designing Services.

2 Day workshop

The needs assessment will provide the commissioner with a broad set of requirements and outcomes that a service is required to deliver, but how do commissioners modify an existing service or build a new one to meet these requirements?

This module provides delegates with the necessary tools and techniques to plan and implement changes to services or to help design new ones. It will provide an understanding of:

- the principles and priorities for managing change,
- successful delegation of responsibilities,
- project management requirements,
- performance planning and stakeholder engagement,
- defining service specifications.

CI05: Commissioning – ensuring compliance with procurement law and ethical behaviour.

1 Day workshop

This module focuses on the key procurement element of commissioning and concentrates on preparing accurate contract and tender documentation. It will explore procurement regulations, ethical behaviour and look at the templates and guidance available. It will provide delegates with experience in customising contract schedules and, through the use of practical case studies, how to manage risk and avoid costly legal fees.

Level 3 - Advanced (6 Modules):

CA01: Commissioning, how to plan for a complex procurement and for future contract management.

2 Day workshop

This module covers specific planning requirements for commissioning decisions that require complex procurements and/or contract management. Included in this module will be practical examples which demonstrate:

- the importance of business case preparation,
- the development and understanding of financial modelling,
- continued detailed needs assessment,
- production of contract management strategies.

Delegates will develop their skills through practical exercises, case studies and templates based on a multi-year, multi-phased example from which they will have to produce a solution to the issues and problems encountered.

CA02: Commissioning for innovation - how to develop both outcome-focused specifications and performance requirements.

1 Day workshop + work based assignment

This module is designed to develop an understanding of how prescriptive specifications can stifle innovation and continuous improvement. Using case studies and practical examples from other sectors, delegates will learn how to work towards output or outcome based specifications, and how the introduction of innovation can improve performance, reduce costs and still maintain quality.

The work-based assignment will require delegates to produce an output-based specification for a service currently being delivered by their organisation.

CA03: Enhanced Understanding of Contracts, Ethics, and Best-Practice principles for commissioning during the life of a service.

2 Day workshop

This is an advanced module that focuses on contract law, ethical commissioning practices, standards of conduct and techniques for continuously developing a service following contract award. Delegates will develop skills using a variety of scenarios designed to improve techniques in dealing with complex financial models, non-compliance, bid modification or clarification, and multiple stage procurements.

Case studies will be used to reinforce the procurement standards of conduct for fairness, transparency and for avoiding collusive tendering. The laws on Intellectual Property Rights, copyright, moral rights, and confidentiality will be explored in more complex contracting situations.

Delegates will also use practical exercises to develop an understanding of government policy on race, equality, diversity and sustainability in public sector contracting.

CA04: Linking performance management to future commissioning decision.

1 Day workshop

This module aims to develop delegates understanding of how current service performance and future performance management are linked to commissioning decisions

It focuses on how commissioners should use high quality management and cost information in the needs assessment process, and how this enables risk to be considered. Delegates will learn the importance of obtaining the right level and type of information to make both informed quality versus cost analysis and to gain a clear understanding of cost models.

This module builds on Module CI01 by developing a better understanding of performance management and reporting analysis, and looks at:

- how cost model information (e.g. whole-life, transaction, unit and fixed models) can influence decision making;
- how to balance cost and quality in service delivery; and
- wider performance management issues.

CA05: Collaborative commissioning in a multi agency environment. *1 Day workshop*

This module looks at collaborative commissioning in a multi-agency environment and helps delegates to understand the potentially complex nature of working with other organisations in order to achieve a common desired outcome.

It considers the collaborative process, likely barriers and ways of working around them. Case studies and group exercises will be used to highlight common issues and techniques for dealing with them, and at how longer term strategies may be needed to derive the maximum benefit from collaborative working.

This module also considers the various roles and responsibilities in collaborative commissioning relationships, and at how organisational functions may need to be changed in order to accommodate such partnering arrangements.

CA06: Case Study and Executive Presentation. *2 Day workshop*

This module will further develop the communication and presentation skills that delegates have acquired to date through the various case studies which are an integral feature of this learning programme.

Delegates will work with the instructor and other delegates to re-examine each case study for lessons learned. The successes, failures, barriers and other issues specific to each case will be explored, and delegates will be required to prepare and present their findings to a panel of cross-government senior managers (in order to demonstrate that they possess the skills required to present a structured and compelling business case to senior stakeholders).

Strategic Seminars (5 Seminars custom-designed for a senior audience):

CS01: Commissioning Essentials for Senior Managers, Policy Leads, Directors and Board Members.

1/2 Day seminar

This seminar provides a concise and practical introduction to effective commissioning.

It aims to demonstrate that effective commissioning cannot identify the commercial opportunities associated with various service provision options, but can also provide mechanisms for managing risk in business areas where commissioning influences performance.

In order to help delegates to develop specific strategies for success and risk reduction, examples of both successful and less successful public sector commissioning exercises will be reviewed and assessed as case studies.

CS02: The Role of the Senior Manager/Director/Board Member - Ethics, Liability and Standards of Conduct.

1/2 Day seminar

This seminar will look at standards of conduct and ethical considerations throughout the contracting cycle, and will highlight best practices in both the public and the private sectors.

It will review relevant case law and the views given by Judges with regards to commissioning, commercial management, and procurement fairness - and will detail how poorly managed procurement exercises can result in very large damage awards.

Finally this seminar will review court decisions that affect personal liability (understanding Directors' liabilities and responsibilities is important if organisations are not to become disproportionately risk averse) and how to avoid adversarial relationships that hinder the commissioning agenda.

CS03: Advanced Procurement Strategies - achieving success in this important area of commissioning.

1/2 Day seminar

This seminar explores emerging best practices and strategies for managing complex or high-risk procurements.

Examples from across Government will be used in discussion to support senior managers in developing an understanding of contracting-out, outsourcing, public private partnerships, and other joint solutions.

Senior managers will be encouraged to discuss the capacity of their own organisation to overcome any constraints to implementing or applying best practice.

CS04: Strategic Risk Implications in Commissioning and Procurement.

1/2 Day seminar

Structuring the right contract or partnership with a supplier requires judgment and experience.

Passing too many risks over to suppliers can increase costs, discourage potential supplier interest and stifle innovation, but at the same time senior managers must protect their organisation and get quality service delivery from their contracts.

This seminar will use case studies to identify and quantify risks in programme delivery. Senior managers will then explore how commissioning can be used to develop contract solutions for sharing or transferring risk.

CS05: Performance Management.

1/2 Day seminar

This seminar explores strategies for implementing effective performance management frameworks and focuses on the planning and negotiation of key performance indicators in service level agreements and contracts. It will help senior managers develop strategies for resolving supplier non-compliance and how to build these into any future commissioning decisions.

Excalibur's Trainers

Courses will be delivered by a team of highly qualified and experienced trainers who have hands on experience in the commissioning environment both as practitioners and strategists. Trainers will be either permanent members of staff or associates who have a good knowledge of Probation Services and community based commissioning. Excalibur is an ISO9001 approved company and has a stringent selection policy when it comes to ensuring that trainers have the right learning skills for the subject they are delivering.

Pricing Schedule

The prices given below are exclusive of VAT (to be charged at the prevailing rate).

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| Standard Rate | £250.00 per delegate per course |
| Discounted Rate - for parties of three and above (from the same organisation). | £200.00 per delegate per course |
| Corporate Rate - an annual rate for an unlimited number of delegates (from the same organisation). | £6,000.00 per annum |
| Mentoring & Support Discount* - for customers who have subscribed to Excalibur's Mentoring & Support Service for 12 months or more. | 2 delegate places on each course free of charge per annum |

*Please contact ian.clarke@excalprocure.com for more information on this service.

Training Venues

Excalibur proposes to run each of the modules in six geographical locations across the country in order to reduce Probation staff travelling time and costs. The venues will be in the following areas:

- Havant in Hampshire (Excalibur's own Training Facilities)
- Exeter
- London
- Birmingham
- Cardiff
- Leeds

Due to the workshop style adopted for the training, places will be limited to 20 delegates per Venue and Excalibur reserve the right to cancel any course should take up fall below 6 attendees. A calendar with the dates for the course is attached.

Terms and conditions for training modules and events

How do I book a place on a training course?

Please complete the booking form sent as a separate electronic attachment to this document and return it to trusts@excalprocure.com or post it to Excalibur Procurement Services Limited, Langstone Gate, Solent Road, Havant, Hampshire, PO10 7NX.

Booking Confirmation

Once we have processed your booking, we will send you a confirmation email with an invoice.

Payment

Payment must be received within 30 days of the invoice date or in advance of the training course whichever is sooner. Payment can be made by:

- BACS to Excalibur Procurement Services Limited
- cheque made payable to Excalibur Procurement Services Limited
- credit card or government procurement card

What does the fee include

All Excalibur course fees include all relevant course materials, refreshments and lunch. The fees do not include delegate travel or accommodation or any other expenses.

Special requirements

Excalibur will make every effort to accommodate special requirements that have been notified on the booking form.

Joining Instructions

Joining instructions including an outline of the day, venue details, map and local hotel details (for the 2 day courses) will be issued approximately two weeks prior to the course. If you have not received your joining instructions seven days prior to the training course, please call 02393 454545. Excalibur will not be held responsible for non-receipt of joining instructions and refunds will not be issued under such circumstances.

Course transfers

There is no charge for transferring your booking to the same course on an alternative date or venue provided you notify Excalibur by email, telephone or in writing up to 7 working days before the start of the course and that there is availability. However, a transfer fee of 20% of the course fee (plus VAT) will be payable if notice is received within 7 working days of the start date of the original course. No refund will be made in the event of a transfer.

Cancelling your place

If you notify Excalibur in writing or via email up to 14 working days before the start date of the course, we will give you a full refund less an administration fee of 20% (plus VAT). However if you withdraw for whatever reason within the 14 day period, the full fee will remain payable if you are unable to nominate a substitute attendee.

Non-attendance

If you fail to attend the course on which you are booked and have not given prior notice to Excalibur then the course fee will remain payable in full.

Cancellation by Excalibur

Where circumstances dictate, Excalibur reserves the right to alter published programmes, trainers or venues without prior notice. In the event of a course being cancelled, a refund of the course fee will be made but no compensation will be paid for any additional costs incurred.

Venues

Details of the training venues will be sent in the joining instructions for all courses.

Dress code

Smart casual clothing.

Liability

Excalibur Procurement Services Limited does not accept responsibility for anyone acting as a result of information or views expressed on its training courses including course material. Opinions expressed are those of individual trainers and not necessarily those of Excalibur. Participants should take professional advice when dealing with specific situations.