# Social Procurement Capability Assessment template

## Foundations for social procurement success

Departments and agencies set strong foundations for social procurement success by:

* maintaining a robust procurement governance framework; and
* aligning their procurement strategy with their organisation’s business strategy and procurement profile.

## This assessment supplements an organisational capability assessment

A capability assessment determines the organisation’s current procurement capability, identifies capability gaps, and informs the preparation of a capability development plan to drive continuous improvement.

All departments and agencies should undertake a capability assessment as part of their annual procurement planning process. This informs the capability development plan, which is a mandatory component of an organisation’s procurement strategy under the goods and services policies.

Tools and templates are available to assist departments and agencies with their capability assessment (e.g. refer to the [Capability Assessment Tool and Template](https://buyingfor.vic.gov.au/capability-goods-and-services-procurement-guide) for goods and services procurement).

At a minimum, departments and agencies should complete a capability assessment every year (i.e. covering all areas of the organisation that are involved in procurement). Capability assessments can also be used to assess capability at the business unit or individual level, as required.

This Social Procurement Capability Assessment is designed to supplement an organisation’s capability assessment. It provides a high-level overview of the organisation’s progress toward embedding social procurement in their procurement function.

## Completing the assessment

Departments and agencies should complete this assessment at least annually when reviewing their Social Procurement Strategy.

The assessment must be:

* carried out by someone with appropriate expertise and knowledge of the organisation’s procurement function (e.g. a Chief Procurement Officer or internal procurement unit); and
* approved by the organisation’s Accountable Officer or delegate.

The assessment has two components:

* **Part A** contains ten items that are framed as positive statements. The assessor indicates the extent to which they agree or disagree with each statement by placing a ‘tick’ in the appropriate column.
* **Part B** contains a free text box. The assessor completes a high-level progress statement based on the responses to Part A. The statement should summarise the organisation’s progress toward embedding social procurement in its procurement function (the Social Procurement Framework) and be no more than 250 words in length.

At low levels of maturity, it may be appropriate for responses in Part A to be ‘Neutral’, ‘Disagree’ or ‘Strongly disagree’. Over time, the organisation’s Social Procurement Strategy should aim to move the organisation closer to a ‘Strongly agree’ response for all items.

Where the response is ‘Unknown’, departments and agencies should take steps to ascertain the current situation and update the Part A response as soon as practicable.

## SOCIAL PROCUREMENT CAPABILITY ASSESSMENT

**Organisation:** [*Insert name of department/agency*]

**Assessment date:** [*Insert date that assessment is completed*]]

**Assessor(s):** [*Insert the name and title of assessor(s*)]

**PART A:**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Item | Description | Strongly disagree | Disagree | Neutral | Agree | Strongly agree | Unknown |
| 1 | Our Social Procurement Strategy covers all core components (see the relevant Social Procurement Strategy template) |  |  |  |  |  |  |
| 2 | Our governance framework / accountability mechanisms promote compliance with the Social Procurement Framework |  |  |  |  |  |  |
| 3 | Procurement spend is actively monitored to ensure that value-for-money outcomes are achieved, taking into account financial and non-financial factors including:* the total benefits and costs over the life of the goods, services or construction being procured
* environmental, social and economic factors
* any risk related to the procurement

This includes social procurement commitments.  |  |  |  |  |  |  |
| 4 | Senior management view social procurement as a strategic priority and set the tone from the top. |  |  |  |  |  |  |
| 5 | Senior management clearly communicate and supervise social procurement related roles and responsibilities. |  |  |  |  |  |  |
| 6 | Individuals with social procurement related roles and responsibilities have sufficient knowledge, skills and experience to identify and pursue opportunities to deliver social and sustainable outcomes through procurement. |  |  |  |  |  |  |
| 7 | Recruitment, training and professional development activities in relation to procurement integrate social procurement knowledge, skills and experience. |  |  |  |  |  |  |
| 8 | Social procurement is embedded throughout the procurement function (e.g. in procurement-related systems, policies and processes for planning, sourcing and contract management). |  |  |  |  |  |  |
| 9 | Supplier and stakeholder relations are managed on an ongoing basis to promote compliance with contractual obligations. This includes social procurement commitments. |  |  |  |  |  |  |
| 10 | Performance of the procurement function is monitored and assessed on an ongoing basis to drive continuous improvement and support the achievement of any whole-of-government and other social procurement targets, through reporting. |  |  |  |  |  |  |

**PART B:**

|  |
| --- |
| Progress statement (250 words max) - summarise the organisation’s progress toward embedding social procurement in its procurement function |
|  |

### SIGNATURES:

**Signed by assessor(s):** ..................................................... Date ........................

 ..................................................... Date ........................

**Signed by Accountable Officer / delegate:** ..................................................... Date ........................

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