

# Spend Summary: Budget 2019/20

Actual 2018/19	Budget 2019/20	Activity
151,000	132,750	Construction
143,000	145,400	Homes
153,000	148,700	FM
149,500	147,450	Infrastructure
144,500	48,600	Offsite
0	214,050	Offsite CITB Funding Costs
192,300	178,676	Fairness, Inclusion & Respect
124,000	108,350	Wales
20,000	100,500	Scotland
9,000	0	Resources (Materials)
80,000	120,000	Category Groups x 3 (Plant, Labour, Waste)
0	30,000	Wellness SIG
15,000	15,000	SIGs x 1
55,000	80,500	IT Platform
15,000	16,000	Horizon
20,000	20,000	Research – core budget
170,000	170,000	Management
56,000	60,000	Travel
8,000	15,000	Disallowed VAT
40,000	20,000	Contingency
<b>1,545,300</b>	<b>1,770,976</b>	<b>Total</b>



# Construction Supply Chain Sustainability School Business Plan 2019-20

# Construction: Objectives 2019-20

- 1. Drive and capture impact in the supply chain:** Focus on driving existing members in key regions to do more, increasing the number of bronze, silver and gold members. The School needs to demonstrate value by capturing business and sustainability benefits and focus marketing efforts on communicating these benefits to the supply chain.
- 2. Engage more clients:** Raise awareness of the School amongst clients and encourage them to drive the sustainability agenda through their supply chains. Partners to facilitate the development of these relationships.
- 3. Engage designers (working alongside Offsite Group, and other sector groups):** Continue to work alongside the other school sector groups and facilitate an active Professional Practice Group to encourage close collaboration between clients, designers and the supply chain. There needs to be a clear designer 'member' journey, complimented by tailored resources and value proposition for the design community.
- 4. Build and maintain collaborative relationships with industry bodies to drive innovation and impact:** The School needs to maintain / develop a small number of mutually beneficial collaborative relationships so as to maximise impact and ensure no duplication of effort
- 5. Maximise Partner value:** Partners should maximise the potential impact of the School through collaborating with each other and the School team to help drive impact, and work with the School to agree action plans in relation to the Maturity Matrix, with a key focus on engaging procurement / supply chain, commercial, and learning and development teams. The School should help facilitate knowledge sharing amongst Partners.

# KPI's - by March 2020 (1)

## 1) Driving impact with the supply chain

- **Engagement and training**
  - 2,250 active members *(companies)*
  - 7 x ½ day sustainability issue specific collaborative training events *(each event to feature client and partner speakers, and a case study showing how a specific sustainability issue has been tackled, and resulting business benefit).*
  - 120 attendees at 8 issue specific training workshops *(public or partner specific)*
  - 250 participants in webinars
  
- **Assessments**
  - 800 sustainability maturity assessments
  - 400 sustainability maturity re-assessments
  
- **Bronze/ Silver / Gold**
  - 500 suppliers to be Bronze, Silver or Gold
  
- **Updating resources**
  - 4 x quarterly updates of resource library content
  - Updates of e-learning modules

# KPI's - by March 2020 (2)

## 1) Driving impact cont'd

- **Learning:**
  - **Quality:** 95% of attendees will rate the training quality as good or excellent
  - **Impact:** 80% of attendees agree training will change the way they do business
  
- **Exemplar project case study**
  - Produce an exemplar project case study that highlights collaboration through the value chain. PR / marketing focus on ££ savings and how the School has influenced its success
  
- **Impact survey to capture business and sustainability benefits and market these to the supply chain**
  - Active Partners to share business benefits (from 2018-19 survey results) with their supply chains, and a corresponding call to action
  - Active Partners to email 2020 survey to their priority suppliers and encourage participation
  
- **Best practice in sustainability / sustainable innovation case studies**
  - Develop 2 issue specific case studies to be hosted on the School site – in total 17 to be developed by the wider School

# KPI's - by March 2020 (3)

## 2) Engage more clients

- 8 clients to speak at School training / engagement events
- 10 construction clients to be active in the School
- At least 1 new client Partner
- Run 1 client workshop (e.g. How can clients have a more common approach in what they ask from their supply chain?)

## 3) Engage designers (working alongside the Offsite Group and Professional Practice Group)

- 250 designers active in the School
- Develop and publish designer case study
- Continue to facilitate an active Professional Practice Group

## 4) Building collaborative relationships with industry bodies

- Maintain partnership agreement with UKGBC, and agreement on collaborative working on circular economy and general mutual signposting of resources
- Work with CIPS through the Procurement SIG and publish a dedicated section of the website for Procurement / Supply Chain Managers
- Build relationship with Constructionline, Considerate Constructors Scheme (CCS) and other appropriate bodies

## KPI's - by March 2020 (4)

### 5) **Maximise partner value**

- 80% of Partners to have action plans in relation to the Partner Maturity Matrix
- 95% of Partners to repeat
- At least 2 partners to present case studies at Leadership Group meetings on supply chain engagement with the School and / or internal knowledge management
- 90% of active partners to use School CPD materials to develop internal knowledge / skills
- 10 webinars for partner organisations / their supply chains

# Budget to March 2020 - Construction

## Sector group has ability to re-prioritise activities in-year

**BOLD** = School wide, not just construction

Budget item	Budget
½ day issue specific training events x 5 @ £6,000 & 2 shared @ £3,000 <sup>(50 attendees each)</sup> <i>(2 shared with Wales and Scotland @ £3,000)</i>	£36,000
Issue specific workshops x 4 @ £1,500 <i>(15 attendees each, Partner led or Public workshops)</i> & 4 @ £750 each as shared with FIR(2), Wales (1) & Scotland (1)	£9,000
Run webinars x 9 @ £1,350	£12,150
Support at 9 Partner internal events @ £500 each <i>(time, travel)</i>	£4,500
<b>PR strategy and implementation</b>	£2,000
Case study video testimonials x 2	£2,000
<b>Member engagement, relationships, case studies and site content</b>	£31,500
<b>E-learning refresh &amp; CPD Learning</b>	£5,000
<b>Knowledge manager</b> <i>(resource library updates)</i>	£7,700
Sector Manager	£16,000
<b>New Partner promotion</b>	£6,900
<b>Total cost</b>	<b>£132,750</b>



# Critical tasks per quarter

When	School team	Partners
Q1	Launch new web platform and sustainability maturity assessment	Partner to propose exemplar project case study ideas
	Agree action plans with Partners re. Partner Maturity matrix	Send impact survey business benefits results to priority suppliers with clear call to action
	Promote impact survey results and the value / benefits of membership	Agree Action Plans with the School team re. engagement
	Finalise programme for collaborative training events for the year	Each Partner to approach 2-3 clients to engage in the School and report progress back to group
	Agree collaborative working on circular economy and mutual signposting of resources with UKGBC	Identify theme and target clients to attend Client workshop, and invite clients to workshop
Q2	Refresh e-learning	Volunteer to peer review e-learning
	Run client workshop	Attend client workshop
	Identify issue specific case studies	Suggest potential case studies to school team
Q3	Conduct filming for issue specific video testimonials	Peer review e-learning
Q4	Publish case study video testimonials	Share case study video testimonials with priority suppliers
	Publish exemplar project case study	Share exemplar project case study with stakeholders / supply chain
	Publish dedicated section of the website for Procurement / supply chain managers	Share dedicated procurement pages of the website with relevant colleagues

# Ongoing critical tasks

When	School team	Partners
<b>Ongoing</b>	Member comm's to drive engagement	Support School briefings, webinars, workshops
	Updates to resource library	Recommend partnership / membership
	Run supplier briefings, webinars, workshops and partner internal events	Identify speaker opportunities for the School / promote the School at external and internal events
	Ensure CPD on all materials is maintained	Raise awareness of the School both internally and with the supply chain
	Maintain partnership agreement with UKGBC	Recommend suggested case studies of sustainability best practice / innovation to the School
	Demonstrate leadership to sector, through PR strategy that includes press coverage, conferences / speaker opportunities	
	Build relationship with CCS, Constructionline and other appropriate bodies	
	Work closely with the Offsite group and Professional practice group to ensure engagement with designers is progressing	
	Build membership of Partners	
	Ensure UK wide programme of events, engaging	



# Homes Supply Chain Sustainability School Business Plan 2019-20

# Homes: Objectives 2019-20

- 1. Drive and capture impact in the supply chain:** Continue to upskill the supply chain via issue specific briefings in key regions, with a focus on increasing the number of bronze, silver and gold members. The School needs to demonstrate value by capturing business and sustainability benefits and focus marketing efforts on communicating these benefits to the value chain.
- 2. Collaboration on combatting Modern Slavery:** Partners to harness their combined influence on the supply chain and work with the School to develop and deliver tailored support to both the Homes partners and their supply chains considered 'high risk' for modern slavery.
- 3. Leading the wider School's focus on the waste agenda:** Partners to lead and steer the work undertaken by the School in the area of waste management through active participation in the new Waste Category Group.
- 4. Maximise Partner value:** Partners to work with the School team to agree action plans in relation to the Maturity Matrix, with a key focus on engaging procurement / supply chain, commercial, and learning and development teams. The School should help facilitate knowledge sharing amongst Partners, both in relation to supply chain engagement and internal knowledge management.
- 5. Build membership of Partners:** The Partnership offer should be clear and focus on the added value for the potential Partner.

# KPI's - by March 2020 (1)

## 1) Driving and capturing impact with the supply chain

- **Engagement and training**
  - 800 active members (*companies*)
  - 300 attendees at 7 x ½ day targeted training events. (at least 3 will focus on Modern Slavery)
  - 120 attendees at 8 issue specific workshops
  - 100 participants in webinars for Partners and their supply chains
  
- **Assessments**
  - 450 sustainability maturity assessments
  - 300 sustainability maturity re-assessments
  
- **Bronze/ Silver / Gold**
  - 300 suppliers to be Bronze, Silver or Gold
  
- **Updating resources**
  - 4 x quarterly updates of resource library content

# KPI's - by March 2020 (2)

## 1) Driving and capturing impact cont'd

- **Learning:**
  - **Quality:** 95% of attendees will rate the training quality as good or excellent
  - **Impact:** 80% of attendees agree training will change the way they do business
  
- **Impact survey to capture business and sustainability benefits to members active in Homes, and market these to the supply chain**
  - All active Partners to share business benefits (from 2018-19 survey results) with their supply chains, and a corresponding call to action
  - All active Partners to email and encourage supplier participation in the 2019-2020 impact survey
  
- **Best practice in sustainability / sustainable innovation case studies**
  - Develop 2 issue specific case studies to be hosted on the School site – in total 17 to be developed by the wider School

# KPI's - by March 2020 (3)

## 2) **Collaboration on combatting Modern Slavery** *(scope to be agreed in kick off meeting in March 2019)*

- Development and delivery of engagement plan for high risk trades (waste, security, cleaning, landscaping, demolition, agency labour) that involves benchmarking, training and development of action plans to implement due diligence requirements in order to respond to the Modern Slavery Act Requirements
- Development of standardised PQQ process and questions
- Creation and dissemination of best practice grievance & remediation requirements that can be used by Partners and implemented in the supply chain

## 3) **Maximise Partner value**

- At least 4 homes partners active in the Waste Category group and 4 active in new SIGs
- At least 2 partners to present case studies on supply chain engagement and / or internal knowledge management at Leadership Group meetings
- 90% active Partners using School material to develop internal knowledge / skills
- 5 webinars run for Partners and their supply chains
- 90% active Partners to have agreed action plans in relation to the Maturity Matrix

## 4) **Building membership of Partners**

- Attract 2 new Homes Partners
- 95% of Partners to repeat

# Budget to March 2020 - Homes

Sector group has ability to re-prioritise activities in-year

**BOLD** = cost split across all School Leadership Group budgets

Budget item	Budget
7 x ½ day training events x 6 @ £6,000 and 1 @ £3,000 <i>(50 attendees each)</i> <i>(1 shared with Wales @ £3,000)</i>	£39,000
8 Issue specific workshops x 5 @ £1,500 <i>(15 attendees each, Partner led or Public workshops)</i> & 3 @ £750 each as shared with FIR x1, Wales x1 & Scotland x1	£9,750
Support at 7 Partner internal events @ £500 each <i>(time, travel)</i>	£3,500
Run 5 x webinars @ £1,350	£6,750
Collaboration on Modern Slavery <i>(18 days of consultancy support)</i>	£15,300
<b>PR strategy and implementation</b>	£2,000
Partners / member video testimonials x 2	£2,000
<b>Member engagement, relationships, case studies and site content</b>	£31,500
<b>E-learning refresh &amp; CPD Learning</b>	£5,000
<b>Knowledge manager</b> <i>(resource library updates)</i>	£7,700
Sector Manager	£16,000
<b>New Partner promotion</b>	£6,900
<b>Total cost</b>	<b>£145,400</b>



# Critical tasks per quarter

When	School team	Partners
Q1	Launch new web platform and sustainability maturity assessment	Engage in Modern Slavery workstream and Waste Category Group
	Agree action plans with Partners re. Partner Maturity matrix	Send impact survey business benefits results to priority suppliers with clear call to action
	Promote impact survey results and the value / benefits of membership	Agree Action Plans with the School team re. engagement (internal and supply chain)
	Finalise programme for collaborative training events for the year (including speakers)	Identify social housing provider contacts to invite to engage in School training/ engagement events
		Share impact survey results on business sustainability benefits with internal colleagues
Q2	Refresh e-learning	Volunteer to peer review e-learning
	Identify issue specific case studies	Suggest potential case studies (showcasing sustainable innovation / best practice) to school team
Q3	Conduct filming for issue specific video testimonials	Peer review e-learning
Q4	Publish case study video testimonials	Share case study video testimonials with priority suppliers
	Publish dedicated section of the website for Procurement / supply chain managers	Share dedicated procurement pages of the website with relevant colleagues

# Ongoing critical tasks

When	School team	Partners
<b>Ongoing</b>	Member comm's to drive engagement	Support School briefings, webinars, workshops
	Updates to resource library	Recommend partnership / membership
	Run supplier briefings, webinars, workshops and partner internal events	Identify speaker opportunities for the School / promote the School at external and internal events
	Ensure CPD on all materials is maintained	Raise awareness of the School both internally and with the supply chain
	Maintain partnership agreement with UKGBC and Home Building Skills Partnership	Recommend suggested case studies of sustainability best practice / innovation to the School
	Demonstrate leadership to sector, through PR strategy that includes press coverage, conferences / speaker opportunities	Actively encourage sub-contractors to engage in briefing events and training workshops
	Work closely with the Offsite group and Professional practice group to ensure engagement with designers is progressing	Promote use of the School's learning resources to colleagues
	Build membership of Partners	Invite relevant supply chain to Modern Slavery workshops
	Ensure UK wide programme of events, engaging Scotland and Welsh Leadership Groups	

# FM Supply Chain Sustainability School

## DRAFT Business Plan 2019-20

# FM: Objectives 2019-20

## 1. **Develop and capture impact in the supply chain:**

Continue to upskill the supply chain via issue specific briefings in key regions, with focus on increasing number of bronze, silver and gold members. The School must demonstrate value by capturing business and sustainability benefits and focus marketing efforts on communicating these to the value chain

## 2. **Maximise Partner value and School engagement:**

Partners to work with the School team to improve level and quality of School engagement, sustainability knowledge and commitment of Partners at strategic and workforce levels. Areas covered include:

- agreeing action plans using the School's Maturity Matrix and Partners' own sustainability objectives as appropriate
- engaging procurement / supply chain, commercial, and learning and development teams developing and using the School's resources to achieve improved use and uptake within the Partners' operational workforces
- facilitating improved knowledge sharing between Partners, both in relation to supply chain engagement and internal knowledge management
- Drawing upon external expert knowledge where necessary to ensure the School offer continues to be innovative
- Participation in an annual conference showcasing leading examples of sustainability in FM

## 3. **Leading the wider School's focus on Wellbeing in the existing built environment:** Partners to lead and steer the work undertaken by the School in this area through active participation in a new SIG (Special Interest Group) examining how the existing built environment can impact positively on user/occupier wellbeing and productivity (budget/terms of reference TBC)

## 4. **Develop Partner membership:** The Partnership offer should be clear and focus on the benefits for existing and potential Partners.

# KPI's - by March 2020

## 1) Developing and capturing impact with the supply chain

- **Engagement and training**
  - 500 active members (*companies*)
  - 200 attendees at 4 x ½ day targeted training events (*each event to feature at least one partner speaker, case study/s, and interactive session/s*)
  - 180 attendees at 12 issue specific workshops
  - 70 participants in webinars for Partners and supply chains
  - 100 participants in the School's FM Annual Conference
- **Assessments**
  - 250 assessments
  - 100 re-assessments
- **Bronze/ Silver / Gold**
  - 150 suppliers to be Bronze, Silver or Gold
- **Updating resources**
  - Quarterly updates of resource library content

# KPI's - by March 2020 (1)

## 1) Developing and capturing impact cont'd

- **Learning:**
  - **Quality:** 95% of attendees will rate the training quality as good or excellent
  - **Impact:** 80% of attendees agree training will change the way they do business
  
- **Impact survey to capture business and sustainability benefits to members active in FM, and market these to the supply chain**
  - All active Partners to share business benefits (from survey results) with their supply chains, and a corresponding call to action
  
- **Best practice in sustainability / sustainable innovation case studies**
  - Develop two issue specific case studies to be hosted on the School site – in contribution to a full suite to be developed by the wider School

# KPI's - by March 2020 *(continued)*

## 2) Maximise Partner value and School engagement

- At least three FM Partners active in the new Waste Category group ensuring full FM input to key issues such as circular economy/single use plastics reduction
- At least two partners to present case studies on supply chain engagement and / or internal knowledge management at Leadership Group meetings
- 90% active Partners using School material to develop internal knowledge / skills
- 6 webinars run with/for Partners
- 70% active Partners to have agreed action plans
- Recognition for most active Partners?

## 3) Lead the School's focus on Wellbeing in the existing built environment

- FM Partners to provide a Chair for this Special Interest Group
- At least four partners (including client, FM service provider and specialist suppliers) to be closely involved in the SIG and development of its findings/outcomes

## 4) Developing Partner membership

- Attract 2 new FM Partners
- 95% of Partners to repeat

# Budget to March 2020 - FM

Sector group has ability to re-prioritise activities in-year

Budget item	Budget
3 x ½ day training events @ £6,000 and one shared with Scotland @ £3,000 <i>(50 attendees each – partners to supply venues if possible)</i> <i>(1 x shared with Scotland @ £3k)</i>	£21,000
Issue specific workshops x 12 @ £1,500 <i>(15 attendees each, Partner driven/led or Public)</i>	£18,000
Plan and run School FM Conference <i>(Partner presentations – interactive sessions: 100 attendees)</i>	£15,000
Run c. 4 webinars @ £1,350 <i>(N.B. cost will increase where new content required)</i>	£5,400
R&D in topics identified by group - use in service/training development: e.g. waste/circular economy/plastics, gender pay gap, skills shortage/development, equality/diversity, wellbeing <i>(c.10 days consultancy support)</i>	£7,200
PR strategy and implementation	£2,000
Awards, Exhibition space and collateral	£2,000
Partners / member video testimonials	£4,000
Member engagement, relationships, case studies and site content	£31,500
E-learning development/refresh & CPD Learning	£12,000
Knowledge manager <i>(resource library updates)</i>	£7,700
Sector Manager	£16,000
New Partner promotion	£6,900
<b>Total cost</b>	<b>£148,700</b>



# Infrastructure Leadership Group

30<sup>th</sup> January 2019





## Business Plan 2019/2020

The Leadership Group is asked to:

Review the proposed business plan objectives and get involved in plotting activities required to deliver these next year

SUPPLY CHAIN SUSTAINABILITY

SCHOOL

# Key objectives 2019/2020



1. **Build on good foundations:** increase focused supply chain engagement in areas of sustainability using existing engagement facilities. More supplier days and workshops designed to drive improved understanding and demonstrable sustainability value to the partners. Achieve external recognition for this activity
2. **Keep our supply chain legally compliant – (focus on Sustainability):** Highlight changes to legislation and find an innovative way to push out the information
3. **Client collaboration:** Create a client specific group in order to identify and communicate a consistent message amongst the infrastructure supply chain
4. **Demonstrate value of the supply chain school:** Build the business case and evidence for partners and members on the use of the school and the outcomes they can support – disseminate this out through the school and to partners boards. Increase the exposure of the school within partner organisations
5. **Increase the instances of collaboration within the Infrastructure sector:** Produce a strategic approach to collaboration and identify key themes and priorities where this approach can then be utilised
6. **Get closer links to forums that allow the school to stay relevant:** Identify stakeholders and forums that can support the development of the Infrastructures thinking and engage in areas of common interest
7. **Support labour group initiative on supply and demand:** Identify and deliver data that will allow labour organisations and subcontracts to understand the demand requirements of key trades going forward

# KPI's - By March 2020

## Build on good foundations:

- ✓ Deliver 3 supplier days for Infrastructure reaching 300 supply chain members
- ✓ Deliver 3 ½ day subject/project specific supplier events reaching 150 members
- ✓ Deliver 10 subject specific workshops with partners and their supply chains reaching a minimum of 275 members
- ✓ 750 Infrastructure Organisations within the school school to demonstrate active engagement with the school
- ✓ 375 Organisational Assessments to be undertaken
- ✓ 174 Organisational reassessments to be undertaken
- ✓ 200 priority suppliers active in Infrastructure to be Bronze, Silver or Gold
- ✓ 4 unique partners to run a workshop on a sustainability topic – either for their internal staff or supply chain (Unique is defined as organisation not hosting or running a workshop in 2018/2019)
- ✓ 98% of partners to repeat their partnership with 2 new Infrastructure partners to be added to the group

# KPI's - By March 2020

## Keep our supply chain legally compliant – (focus on Sustainability):

- ✓ Partners & Supply Chain Sustainability to scope out and cost functionality in the school that will deliver functional and specific messaging relating specifically to issues and legislative requirements in the Sustainability arena

## Client collaboration

- ✓ Through a quarterly client group develop a set of terms of reference and key areas for collaboration that can be delivered through the infrastructure group
- ✓ Deliver a minimum of one of the outcomes from the client group
- ✓ Undertake 1 engagement event that will increase awareness, understanding and innovation in the key collaborative areas

# KPI's - By March 2020

## Demonstrate value of the supply chain school :

- ✓ Develop a toolbox talk (2 mins) or instructional video (5 – 7 minutes) outlining the benefits partners have gained from being partners in the school.
- ✓ Create Infrastructure content in the school that articulates the benefits of the school and how it can be used to maximum effect
- ✓ Include 1 member presentation at every supplier day supporting the business case for use in the school
- ✓ 1 partner per month to provide a story or evidence of how the school has aided their supply chain as part of the monthly marketing campaigns

# KPI's - By March 2020

## **Increase the instances of collaboration within the Infrastructure sector:**

- ✓ Develop a collaboration strategy and prioritise key areas of focus for 2019/2020
- ✓ Deliver on at least 1 area of collaboration within the school by the end of 2020 financial year
- ✓ Deliver at least 2 of the requirements relating to the social value outputs from the working group in 2018/2019

## **Get closer links to forums that allow the school to stay relevant:**

- ✓ Undertake a stakeholder mapping exercise to identify and prioritise forums and working groups that the Infrastructure group need to work closer with
- ✓ 4 key stakeholders and forums to be invited and present at leadership groups in 2019/2020 business plan year

## **Support labour group initiative on supply and demand**

- ✓ Employment & Labour group to present the future skills work plan at the first leadership group of 2019/2020
- ✓ The leadership group to identify how they would like to support the work and feed in to the groups work plan
- ✓ Updates to be provided by the Employment & Labour group at every leadership meeting in the 2019/2020 business plan year

# KPI's - By March 2020

Measure	Target 2018	Target 2019
Active members	750	750
Assessments	375	375
Re-assessments	174	174
Priority Suppliers, Bronze, Silver or Gold	100	200
Supplier days	1 event	4 events
Workshops	10 workshops	10 workshops
E-learning Module Development	0	0
Toolbox Talks/Video	0	2



# Management actions

Vision theme	Activities	When
Subject Matter	Refresh e-learning	Q2
	Updates to resource library	Q1, 2, 3, 4
	Group to steer priorities of the Horizon Group	Q1
Target Audience	Member communications to drive engagement	Ongoing
	Identify target forums and stakeholders to engage	Q1
	Work with prioritise stakeholders to identify areas for closer collaboration	Ongoing
	Run supplier days, workshops and Partner internal events	Ongoing
Accreditation	Ensure CPD on all Infrastructure materials is maintained	Ongoing
New Knowledge	Publish Partner and Member case studies and video testimonials	Q4
Leadership	Demonstrate School's visible leadership to sector, through PR strategy that includes press coverage, conferences	Ongoing
	Identify sustainability initiatives to collaborate on and deliver at least one of the requirements	Q1,2&3
	Prioritise at least 2 of the social value requirements and deliver these through the business plan year	Q2, 3 & 4
Geographic reach	Ensure UK wide programme of training, engaging with all key project areas within the Infrastructure Sector	Ongoing
	Run supplier days, workshops and Partner internal events throughout UK	Ongoing
Partners	Identify key partners who would like to contribute case studies, testimonials etc	Q1

# Budget to March 2020 - Infrastructure

Sector group has ability to re-prioritise activities in-year

Budget item	Budget
Supplier days x 3 supplier days (300 attendees) @ 12,000 per event = £36K One shared with Offsite & Wales = 1 @ £12K and 2@£6K = £24K	£24,000
½ supplier days – theme/project specific x 3 @ £6,000	£18,000
Issue specific workshops x 5 @ £1,500 & 5 @ £750 each as shared with FIR, Wales & Scotland	£11,250
Client Collaboration Meetings & Support 3 meetings + 3 days support for output (£850 per day)	£5,100
Development of 1 videos – toolbox talks relating to value of the school	£10,000
Support at 7 Partner internal events – time, travel etc ( <i>£500 for travel and expenses</i> )	£3,500
<b>Member engagement, relationships, case studies and site content</b>	£31,500
<b>E-learning refresh and cost of CPD</b>	£5,000
<b>Knowledge Manager</b>	£7,700
Deliver support to implement social value groups requirements (10 days @ 850)	£8,500
<b>Sector Manager</b>	£16,000
New Partner promotion	£6,900
<b>Total cost</b>	<b>£147,450</b>



# Offsite Business Plan

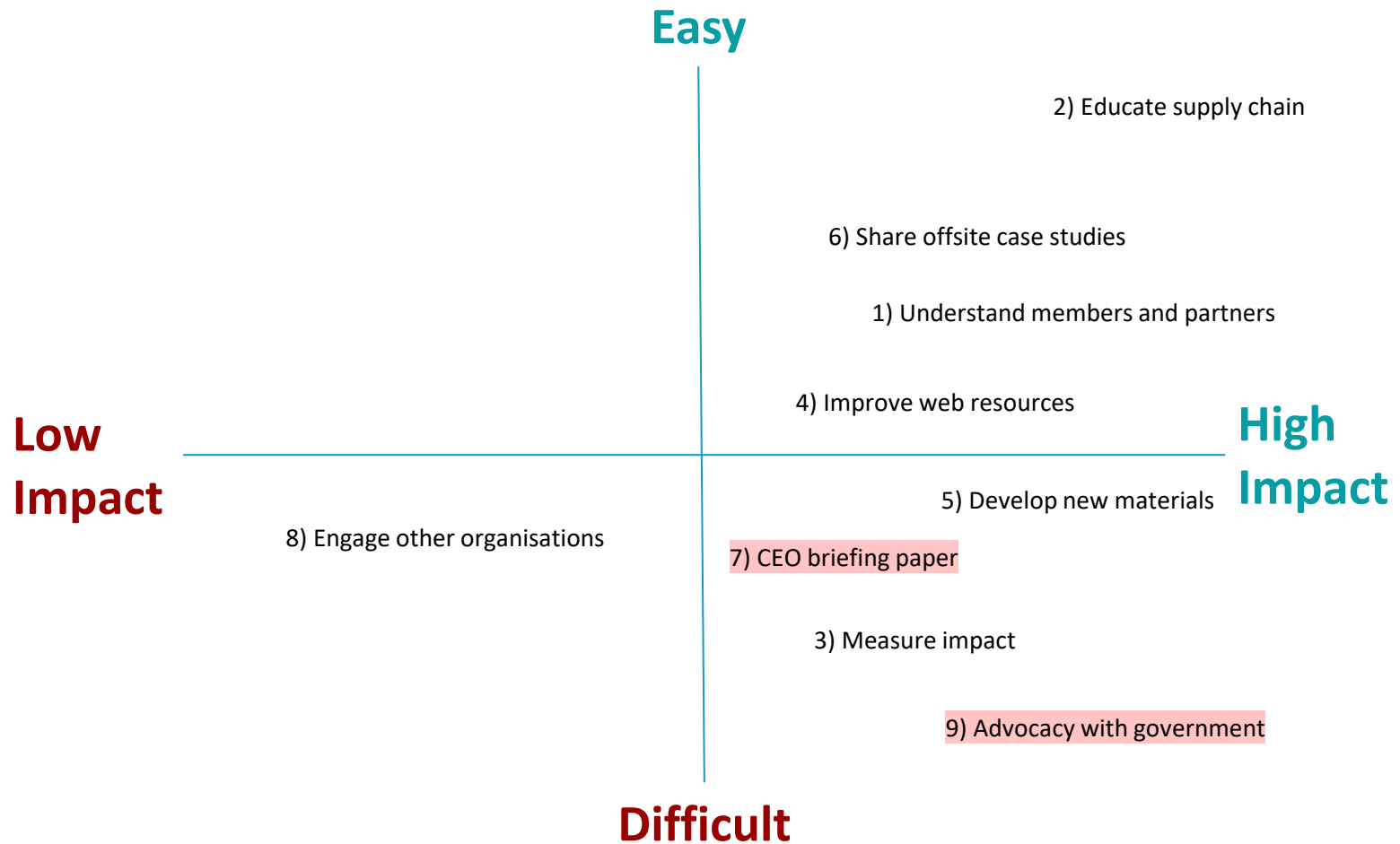
February 2019

# Business planning process

Starting October and concluding in March at the AGM



# Ease and Impact Grid



# Key objectives 2019/2020 - 1

**1) Understand our membership & partners** – By better understanding the members and partners of the School, we will be better able to target our communications to them around resources that will engage and inspire them.

Action £: Supply Chain School to review member data and activity data to better inform school outreach and service offering.

**2) Keep educating the supply chain** - By better understanding the members and partners of the School, we will be better able to target our communications to them around resources that will engage and inspire them.

Actions £££:

- Build upon activities this year and continue to reach target audience
- Deliver activities through the Homes, Construction, Infrastructure, Welsh and Scottish Groups
- Devise an improved communications plan

**3) Capturing impact** - We need to understand what difference the School is having on the supply chain. We are output focuses currently, we need to move to outcome and then impacts.

Actions £: Devise a methodology to record impact the School is having – building upon current Impact survey

**4) Improve current web resources** - We need to ensure that all resources on the School are reviewed and updated, including the look and feel of the web portal.

Action £££:

- The School is investing heavily in the new web portal and learning management system
- School team to review all current resources and Partners to provide resources where available

# Key objectives 2019/2020 – 2 (cont)

**5) Develop new training materials** - Using the CITB funding to develop new materials and training capacity. By continuing to develop training resources, interest pieces and industry news, the School can further position itself as the go-to provider for Offsite information and training.

Action **££££**:

- Supply Chain School to deliver the CITB programme
- Partners to notify the school if they want to collaborate on the development of any new training resources and/or events.
- Supply Chain School to ensure better tagging of resources through web-redevelopment to ensure members can easily access the wealth of resources on the site (make better use of what we have already)

**6) Sharing Offsite Case Studies** - Develop examples of best practice in Offsite as video and written examples. Case studies will help School members understand how the theory of Offsite processes can be applied to projects across the built environment. Readers can relate these case studies to their own developments and working practices.

Action **££**: Partners to provide the School with any case studies they have across the built environment that use offsite approaches and try to share the lessons learned from these projects.

**7) Engage other organisations** - By better engaging stakeholders from throughout built environment supply-chains (i.e. designers, manufacturers, contractors, etc) the School will be better able to upskills key influencers that would traditionally limit Offsite applications (i.e. designers not including offsite approaches).

Actions **££**:

- BuildOffsite and the School to collaborate more and work to make their respective offers very clear, complimentary and not competitive. Understand what that then means for respective members accessing services of each
- Continue to support the work of the Design Offsite Group – this will link to the development of new materials
- Reach out to costs consultants and building services engineers – this will link to the development of new materials
- Roadmap of who does what in support organisations – CITB, Build Offsite, GoOffsite, the School, Offsite Hub, Digital Built Britain, Innovation Centres etc

# 2019/20 KPIs

Deliverables Target	Q1	Q2	Q3	Q4	Total
Active companies	175	175	150	100	600
Supplier days / briefings <i>(Combined with Infra, Construction, Wales or Scotland)</i> <i>(Average of 75 learners, target 100)</i>	1	0	1	1	3
Training workshops – engagement or topic based <i>(Average of 20 learners)</i>	2	2	2	2	8
Training workshops – piloting of new courses <i>(Average of 10 learners)</i>	0	4	6	4	14
Learners @ training	105	80	175	155	515
Development of new short duration courses	0	2	3	2	7
Development of new e-learning courses	0	4	0	3	7
Updating e-learning content	0	4	5	4	13
Active Designers	35	75	120	150	150
E-learning downloads <i>(Must be the Offsite or Mgt e-learning)</i>	150	150	150	150	600
Marketing campaigns to Offsite “Community” <i>(# of emails per quarter – not event related.)</i>	10	10	10	10	47
Assessments	40	40	40	30	150
Re-assessments	10	10	15	15	50
Quality of learning	95% excellent or good				
Relevance and impact of learning	80% excellent or good				



# Budget to March 2020 - Offsite

Figures in *italics* paid for by ring fenced funding from CITB

Budget item	Budget
Engagement events: Supplier days x 2 events @ £12,000 (2 combined with other groups @ £6,000), Supplier briefings x 1 combined with Scotland ( <i>Infra, Wales &amp; Scotland</i> )	£15,000
Workshops – engagement or training x 8 @ £1,500 ( <i>15 attendees each</i> )	£12,000
Workshops – piloting of new courses x 14 @ £1,700 ( <i>10 attendees each</i> )	£23,800
Development of 7 short duration courses	£70,000
Development of 7 e-learning modules	£73,500
Updating of current 13 e-learning modules	£35,750
Marketing – PR, Exhibition space and collateral	£7,000
Member engagement, relationships with other groups, case studies and site content	£11,000
Knowledge manager ( <i>resource library updates and updated skills assessment</i> )	£7,700
New Partner promotion	£6,900
<b>Total cost</b>	<b>£262,650</b>



## **The Supply Chain Sustainability School in Scotland Business Plan 2019-20**

Current year financial performance – UK wide

# Current Income 2018/19

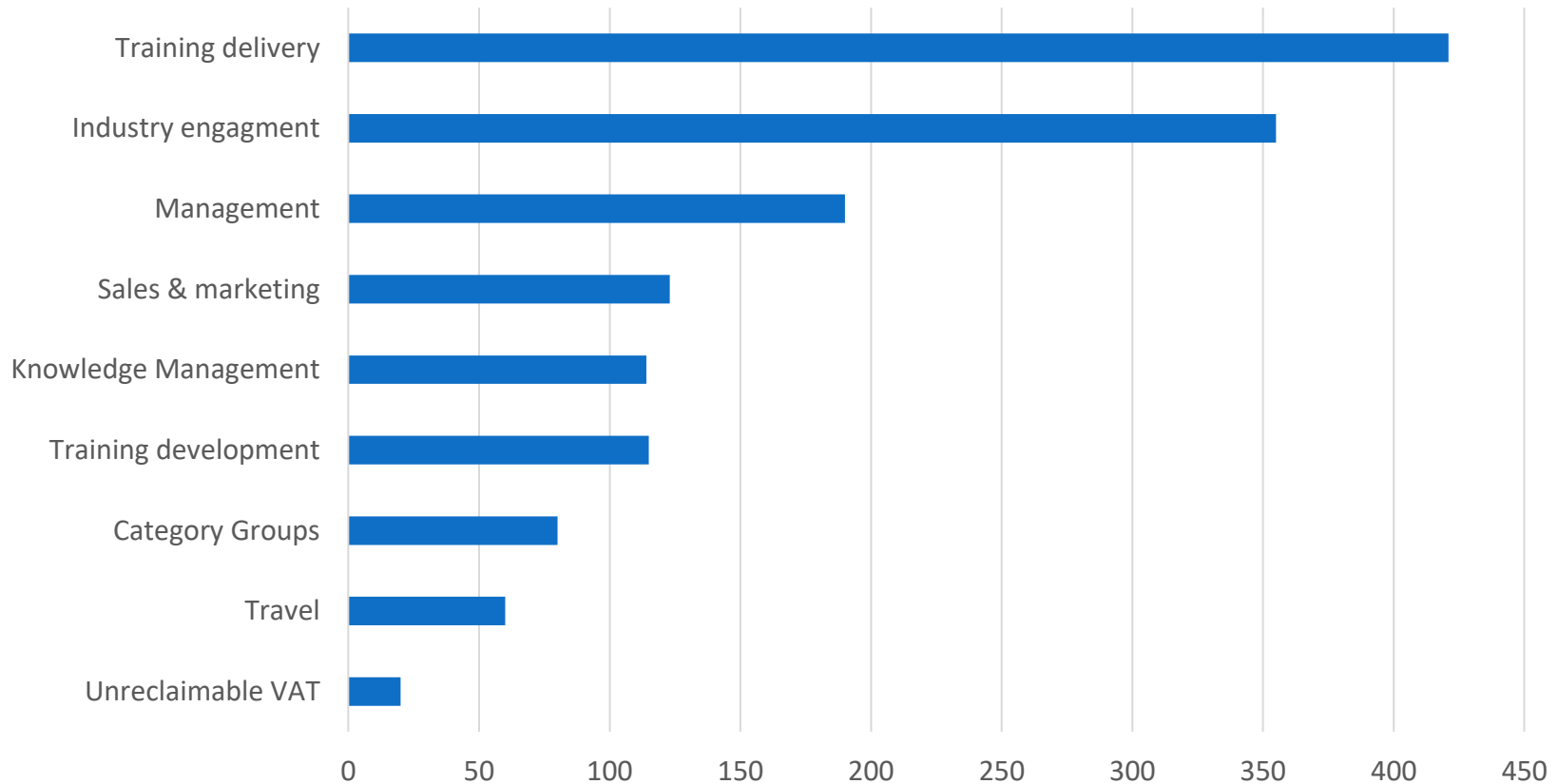
Income Detail	Actual to date	2018/19 Forecast	2018/19 Budget
CITB <i>Restricted funding</i>	375,000	500,000	500,000
CITB FIR <i>Restricted funding</i>	86,000	162,000	162,000
Partner - single x £10k x 45	632,635	841,153	760,000
Multi School x £15K x 5			
Multi School x £20K x 5			
New partners - assume 12			66,000
Wales - funders (NPTC & others)	15,000	15,000	30,000
Australia licence		10,000	5,000
<b>Total</b>	<b>£1,108,635</b>	<b>1,528,153</b>	<b>£1,523,000</b>

Current partner funding assumes no further drop out to year end

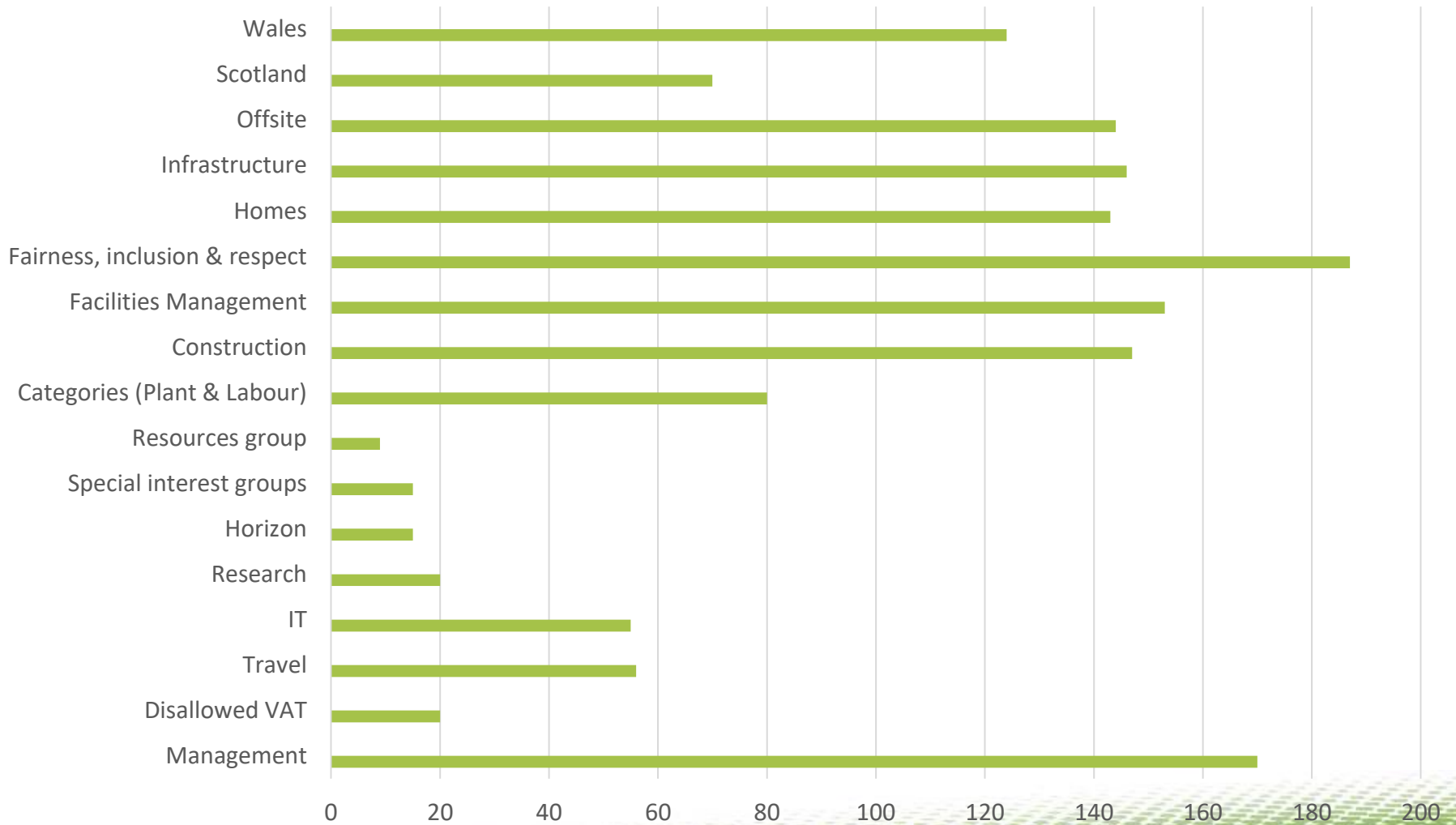
1. 2 partners drop out during renewal process: **Interserve & Fusion**
2. 1 partner drop out over the year: **Travis Perkins**
3. At risk for next year: **Covance, Sapphire, Colas – but we are working hard to retain**
4. We are currently projected to overspend by £6k

# Spend by activity 2018/19

Spend by activity £'000



# Spend by sector groups 2018/19 - £'000





# Income assumptions 2019/20

Income Detail	2018/19 Actual (forecast to year end)	2019/2020 Budget
CITB <i>Restricted funding</i>	500,000	448,500
<i>CITB Restricted funding</i>		214,050
CITB FIR <i>Restricted funding</i>	162,000	135,426
Partner - single x £10k x 45	832,903	881,481
Multi School x £15K x 5		
Multi School x £20K x 5		
New partners - assume 12		65,888
Wales - funders (NPTC & others)	15,000	15,000
Australia licence	10,000	10,000
<b>Total</b>	<b>1,519,903</b>	<b>£1,770,345</b>

Partner funding assumes:

1. 5% increase from 1<sup>st</sup> April 2019
2. 12 Partners to come in next year
3. 3 partners drop out over the year

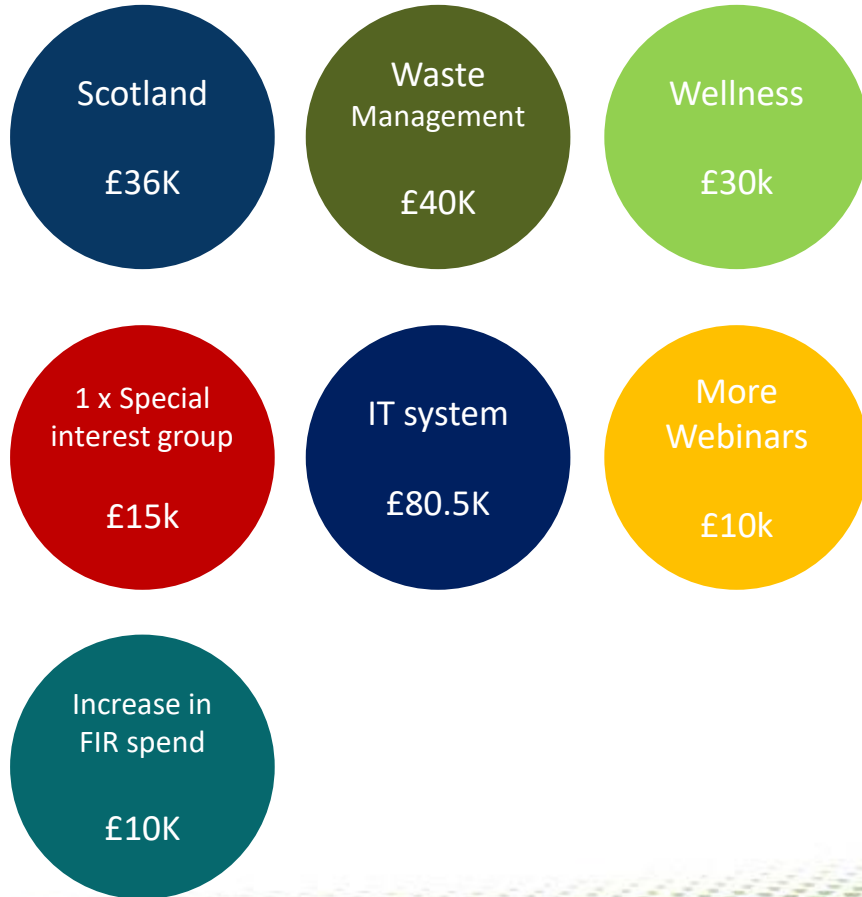


## Spend Summary: Budget 2019/20

Actual 2018/19	Revised budget 2019/20	Activity
151,000	132,750	Construction
143,000	145,400	Homes
153,000	148,700	FM
149,500	147,450	Infrastructure
144,500	48,600	Offsite
0	214,050	Offsite CITB Funding Costs
192,300	178,676	Fairness, Inclusion & Respect
124,000	108,350	Wales
20,000	100,500	Scotland
9,000	0	Resources (Materials)
80,000	120,000	Category Groups x 3 (Plant, Labour, Waste)
0	30,000	Wellness SIG
15,000	15,000	SIGs x 1
55,000	80,500	IT Platform
15,000	16,000	Horizon
20,000	20,000	Research – core budget
170,000	170,000	Management
56,000	60,000	Travel
8,000	15,000	Disallowed VAT
40,000	20,000	Contingency
<b>1,545,300</b>	<b>1,770,976</b>	<b>Total</b>

# Summary of alterations to budget

## Increased spend on



## Reduced spend on



Scotland

Next financial year objectives and budget

# Objectives 2019-20



- 1. Engage and upskill the supply chain:** Continue to upskill the supply chain via issue specific briefings in key Scottish regions. Keep ourselves focused on Carbon, Waste, Social Value and Modern Slavery.
- 2. Measure and capture the impact in the supply chain:** The School needs to demonstrate value by capturing business and sustainability benefits and focus marketing efforts on communicating these benefits to the value chain.
- 3. Maximise partner value by building a collaborative approach to School priorities:** The School should help facilitate knowledge sharing amongst Partners, both in relation to supply chain engagement and client education / engagement. Meeting time will be dedicated to enabling more collaborative activity within the Leadership Group to tackle four priority themes such as Waste and Client Engagement.
- 4. Provide top quality learning resources for our members in Scotland:** Look to review current resources and collaborating and working in partnership with other trade bodies and funding sources. Importantly we are not looking to duplicate current activity, but signpost and stimulate demand where help already exists.
- 5. Build membership of Partners:** We need to reach out to contractors and clients who are active in Scotland and can benefit from a more sustainable construction supply chain. For example, home builders can be better represented in the School's work in Scotland.
- 6. Develop relationships with Scottish support bodies:** Continue to work with BRE, CISC, ZWS and develop relationships with SEPA, Scottish Building Federation and other organisations such as Considerate Constructors

# Scotland - KPIs

Measure	Target 2019	Actual 2019	Target 2020
Active companies	300	265	300
Active individuals	750	827	750
Partners	10	12	15
Workshops	6	5	8
Supplier days	1	1	1
Engagement Events / Breakfast Briefings	6	6	10 Total 6 Briefings
Quality rating of training (% rating as good or excellent)	90%	90%	90%
Case studies of impact – by Dec 2019	5	5	5

*Feb 2019 - Targets to 2020 to be confirmed*

# Budget to March 2020 - Scotland

Sector group has ability to re-prioritise activities in-year, bold costs consistent across groups

Budget item	Budget
Supplier days x 1 - £11,000	£11,000
Supplier briefings x 5 (Unit cost £6,000 but shared therefore £3,000 x 3) (4 shared with other groups e.g. Offsite, Infra & Construction groups)	£21,000
Workshops x 7 - £1,500 x 1 & £750 x 6 (6 shared with other groups)	£6,000
Sector Manager: facilitates the group	£16,000
Member engagement: To deliver the Active Company members; assessments; reassessments; views of elearning resources; phone and online support, case studies and site content etc.	£31,500
<b>Knowledge manager</b> (resource library updates)	£9,000
<b>New Partner promotion</b>	£6,000
<b>Total</b>	<b>£100,500</b>

# Income to March 2020 - Scotland

Income	Budget
<b>Current partner contributions:</b> A proportion of their annual Partnership contribution to the School for Morgan Sindall, Bam, Skanska Cementation, Marshalls, Elliott, BRE, Kier, Danny Sullivan, VGC, ISG, Robertson	£58,700
<b>Local partner and funding contributions:</b> Only active in Scot: Zero Waste Scotland, Resource Efficient Scotland etc.	£11,600
<b>Total Partner contribution</b>	<b>£69,700</b>
<b>CITB Contribution</b> (based on 29% co-funding rate across the School nationally in 2019/20)	£28,000
<b>Total income</b>	<b>£97,700</b>



## The Supply Chain Sustainability School in Wales Business Plan 2019-20



# Wales: Objectives 2019-20

- 1. Drive and capture impact in the supply chain:** Continue to upskill the supply chain via issue specific briefings in key regions, with a focus on increasing the number of bronze, silver and gold members. The School needs to demonstrate value by capturing business and sustainability benefits and focus marketing efforts on communicating these benefits to the value chain.
- 2. Collaboration on combatting Modern Slavery:** Partners to harness their combined influence on the supply chain and work with the School to develop and deliver tailored support to both the Homes partners and their supply chains considered 'high risk' for modern slavery.
- 3. Leading the wider School's focus on the waste agenda:** Partners to lead and steer the work undertaken by the School in the area of waste management through active participation in the new Waste Category Group.
- 4. Maximise Partner value:** Partners to work with the School team to agree action plans in relation to the Maturity Matrix, with a key focus on engaging procurement / supply chain, commercial, and learning and development teams. The School should help facilitate knowledge sharing amongst Partners, both in relation to supply chain engagement and internal knowledge management.
- 5. Build membership of Partners:** The Partnership offer should be clear and focus on the added value for the potential Partner.

# KPI's - by March 2020 (1)

## 1) Driving and capturing impact with the supply chain

- **Engagement and training**
  - 800 active members (*companies*)
  - 400 attendees at 8 x ½ day targeted training events. (at least 3 will focus on Modern Slavery)
  - 150 attendees at 10 issue specific workshops
  - 100 participants in webinars for Partners and their supply chains
  
- **Assessments**
  - 450 sustainability maturity assessments
  - 300 sustainability maturity re-assessments
  
- **Bronze/ Silver / Gold**
  - 300 suppliers to be Bronze, Silver or Gold
  
- **Updating resources**
  - 4 x quarterly updates of resource library content

# KPI's - by March 2020 (2)

## 1) Driving and capturing impact cont'd

- **Learning:**
  - **Quality:** 95% of attendees will rate the training quality as good or excellent
  - **Impact:** 80% of attendees agree training will change the way they do business
  
- **Impact survey to capture business and sustainability benefits to members active in Homes, and market these to the supply chain**
  - All active Partners to share business benefits (from 2018-19 survey results) with their supply chains, and a corresponding call to action
  - All active Partners to email and encourage supplier participation in the 2019-2020 impact survey
  
- **Best practice in sustainability / sustainable innovation case studies**
  - Develop 2 issue specific case studies to be hosted on the School site – in total 17 to be developed by the wider School

# KPI's - by March 2020 (3)

## 2) **Collaboration on combatting Modern Slavery** *(scope to be agreed in kick off meeting in March 2019)*

- Development and delivery of engagement plan for high risk trades (waste, security, cleaning, landscaping, demolition, agency labour) that involves benchmarking, training and development of action plans to implement due diligence requirements in order to respond to the Modern Slavery Act Requirements
- Development of standardised PQQ process and questions
- Creation and dissemination of best practice grievance & remediation requirements that can be used by Partners and implemented in the supply chain

## 3) **Maximise Partner value**

- At least 4 homes partners active in the Waste Category group and 4 active in new SIGs
- At least 2 partners to present case studies on supply chain engagement and / or internal knowledge management at Leadership Group meetings
- 90% active Partners using School material to develop internal knowledge / skills
- 10 webinars run for Partners and their supply chains
- 90% active Partners to have agreed action plans in relation to the Maturity Matrix

## 4) **Building membership of Partners**

- Attract 2 new Homes Partners
- 95% of Partners to repeat

# Budget to March 2020 - Wales

Sector group has ability to re-prioritise activities in-year, bold costs consistent across groups

Budget item	Budget
Supplier days x 3 - £12,000 x 1 each & £6,000 x 2 (2 shared with other groups e.g. Infrastructure, Offsite)	£24,000
Supplier briefings x 3 (Unit cost £6,000 but shared with other groups therefore £3,000 x 2) (2 shared with other groups e.g. Homes & construction)	£12,000
Workshops x 8 - £1,500 x 3 & £750 x 5 (5 shared with other groups: 2 x FIR; 1 x Construction, 1 x Infra, 1 x Homes)	£8,250
Sector Manager: facilitates the group	£16,000
Video based content	£2,000
Member engagement: To deliver the Active Company members; assessments; reassessments; views of elearning resources; phone and online support, case studies and site content etc.	£31,500
<b>Knowledge manager</b> (resource library updates)	£7,700
<b>New Partner promotion</b>	£6,900
<b>Total</b>	<b>£108,350</b>

# Income to March 2020 - Wales

Income	Budget
<b>Current partner contributions:</b> A proportion of their annual Partnership contribution to the School for SRM, Redrow, Bouygues, Kier, Bam, Skanska, ISG, Galliford Try, Wilmott Dixon, Sapphire	£43,700
<b>Current partner contributions:</b> Active in Wales: Welsh Water & SEWSCAP	£17,600
<b>NPTC &amp; Morgan Sindall (£15 &amp; £5 k respectively)</b>	£20,000
<b>New partner contributions</b> One new local Partner @ small contractor rate and one additional national partner joins the group	£10,000
<b>Total Partner contribution</b>	<b>£91,300</b>
<b>CITB Contribution</b> (based on 29.7% co-funding rate across the School nationally in 2019/20)	£27,116
<b>Total income</b>	<b>£118,416</b>



# Employment & Labour Category Group – Business Plan 2019-2020

# Terms of reference

## Objectives Red – indicates complete and/or further development work underway

- ✓ Provide training and awareness materials that can be adopted by partners and members of the school – workshops & e-learning materials
- ✓ Identify tools/systems that can map supply of labour within the UK via projects and/or region – supporting the efficient use of labour within the UK
- ✓ Review the supply and demand challenges of the industry and the opportunities including the future landscape for skills and employment
- ✓ Supply Chain school to be the point of reference for information relating to labour category requirements. This could be standard requirements, market information, stakeholder signposts or generally information that will help clients, contractors and supply chain deliver the most sustainable labour going forward.
- ✓ School to be a vehicle to show potential CITB trained employees opportunities
- ✓ *Agree and implement minimum standards for the use of labour within construction projects on site – e.g. Right to work checks, modern slavery signs etc*



## Outputs Red – indicates complete and/or further development work underway

- ✓ E-learning & Workshop content to support the organisational employment & labour requirements
- ✓ Evaluation report that identifies models and tools that plot labour trade demand and supply within the construction and infrastructure industry – including recommendations on what can be developed and/or adopted by partners of the school
- ✓ *A materiality assessment for each category of labour*
- ✓ *Agreed minimum standards checks and requirements for on site staff including signs of modern slavery, right to work etc*
- ✓ *Development and delivery of a communications plan for the minimum standards*
- ✓ *Training material created to support organisations and procurement teams undertaking labour category management*

# Group Budget – 2019/2020

Action	Lead Position	Day Rate	Number of Days	Total
Project Management	Lead Consultant	£600	10	£6,000
Supplier Day Manpower & Development	Lead Consultant	£600	2	£1,200
Supplier Day	Fixed Price			£5,000
Supply & Demand & Future Skills Project	Digital Apprentice/Consultant/Lead Consultant	£400/£500/£600	15	£8,500
Employment & Labour Standards Development & Stakeholder Engagement	Digital Apprentice/Consultant/Lead Consultant	£400/£500/£600	17	£9,300
Workshop Delivery x 2	Lead Consultant	£600	2	£1,200
E-Learning/Training Materials	Fixed Price			£10,000
<b>Total</b>				<b>£40,000</b>



# Plant Category Group – Business Plan 2019-2020

# Terms of reference

## Objectives

- ✓ Develop and embed minimum standards for plant hire and purchase within the built environment
- ✓ Provide a landscape and potential solutions in relation to supply and demand of plant & operators – particularly in relation to some of the large infrastructure projects currently underway
- ✓ Supply Chain school to be the point of reference for information relating to plant category requirements. This could be standard requirements, market information, stakeholder signposts or generally information that will help clients, contractors and supply chain deliver the most sustainable plant option going forward.

# Terms of reference

## Outputs Red – indicates complete and/or further development work underway

- ✓ *An overview report of the current and future landscape for sustainable plant within the built environment*
- ✓ *Recommendation & delivery of interventions to deal with the challenges of supply and demand issues*
- ✓ *A materiality assessment for each category of plant*
- ✓ *Agreed minimum standards for each category of plant signed off by key partners*
- ✓ Development and delivery of a communications plan for the minimum standards
- ✓ Training material created to support organisations and procurement teams undertaking plant category management. Training materials will include (but not limited to):
  - ✓ E-learning module providing users with an overview of the risks/opportunities associated with plant procurement and how to address these
  - ✓ Workshop module to be included as part of the sustainable procurement workshop
- ✓ Budget for the development of additional materials and support

# Group Budget – 2019/2020

**Total Budget = £40,000**

Action	Lead Position	Day Rate	Number of Days	Total
Project Management	Lead Consultant	£600	10	£6,000
Supplier Day Manpower & Development	Lead Consultant	£600	2	£1,200
Plant Workshop Development	Lead Consultant	£600	2	£1,200
Measurement Development & Implementation	Consultant & Lead Consultant	£500/£600	19	£9,800
Minimum Standards	Lead Consultant	£600	18	£10,800
Workshop Delivery x 2	Lead Consultant	£600	2	£1,200
E-Learning/Training Materials	Fixed Price			£10,000
<b>Total</b>				<b>£40,000</b>