



Procurement competency matrix for procurement professionals

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Published by the Department of Finance, February 2018.

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Foreword

As a provider of services critical to the function of Government, the Department of Finance is committed to driving practical, cost-effective and quality outcomes across the sector. The Department's approach to realising these outcomes is by facilitating cross-agency stewardship to enable agencies to enhance their procurement capability and implement innovative solutions to support the State's strategic directions.

This procurement competency matrix has been developed to assist with the alignment of sector-wide strategies for the procurement workforce, including capability development, succession planning, staff attraction and retention, and performance management.

The development of this document has been a collaborative effort with input from procurement practitioners of many levels from across the sector, to ensure it incorporates a wide range of perspectives and needs. I thank those who have contributed their time and expertise to this initiative. I would like to particularly acknowledge the support provided by the Public Sector Commission, and their shared vision in this important endeavour.

Through fostering a more highly skilled procurement workforce we are proud to contribute to a sector that delivers even better outcomes for Western Australian citizens.

Anne Nolan
Director General
Department of Finance

Overview

The procurement competency matrix (PCM) identifies and defines the competencies required to provide a highly capable procurement function and service by procurement professionals across the WA public sector. It is intended for staff who undertake procurement or contract management activities as a significant part of their role.

The PCM aims to:

- promote a shared understanding of roles, responsibilities and performance expectations of professional procurement positions
- provide consistent competency and capability standards for the professional procurement function across the WA public sector
- support managers and staff by providing defined pathways to address capability gaps across teams or individuals.

The PCM covers both transactional and strategic procurement activities and spans all stages of the procurement lifecycle, including:

- planning
- specification writing
- preparation of quotation and tender documentation
- evaluation of offers
- contract negotiations
- contract management
- disposals
- other related functions.

As the PCM is a sector wide resource, it is recommended agencies contextualise the information for their specific requirements. For example, some agencies may have practice requirements that are additional to those outlined in government policy, which will need to be considered by procurement professionals. In addition, the PCM should be applied in conjunction with the generic public sector's capability frameworks, [Capability profile: levels 1–6](#) and the [Leadership capability profile \(level 7 to class 4\)](#).

For information about the procurement process and other supporting resources, please refer to the [Department of Finance](#) website.

Role type summary

Procurement professionals across the WA public sector have been determined to fall into the four role types below.

ROLE TYPE	ROLE DESCRIPTION
Procurement support	Staff in these roles do not supervise the work of others, and work under the direction of management. They develop and/or manage contracts for low-value low-risk requirements or purchase straightforward requirements from established contracts. Staff in these roles may be involved with medium-value medium-risk procurement activities under supervision, or in a supporting role and are required to provide advice on straightforward procurement matters.
Procurement practitioner	Staff in these roles generally do not supervise the work of others, and work under the direction of management. They develop and/or manage contracts for medium-value medium-risk requirements and may be involved with high-value high-risk procurement activities under supervision, or in a supporting role. Staff in these roles provide advice to various stakeholders on procurement policy, procurement planning, contract formation and contract management activities.
Procurement specialist	Staff in these roles may supervise the work of others, and work under the direction of senior management. They develop and/or manage contracts for high-value high-risk requirements and provide specialist advice to senior stakeholders on procurement policy, procurement planning, contract formation and contract management activities, including policy exemptions, contract variations, and renewal and extension strategies.
Procurement executive	Staff in these roles supervise others, work alongside the agency executive and under the direction of the agency head. They lead the procurement strategy of the agency, including directing a wide range of complex procurement related requirements critical to the agency objectives. Staff in these roles are accountable for the success of the procurement function within the agency and provide advice and recommendations to government, executive and other senior stakeholders on a broad range of complex procurement matters.

The competencies outlined in the PCM are deemed cumulative for the first three role types. For example, to be competent at a Procurement Specialist role type, an individual should be able to demonstrate the competencies expected of Procurement Support and Procurement Practitioner role types.

Depending on agency context, a Procurement Executive role type may be required to demonstrate some competencies of the other three role types. However, primarily the role is focussed on strategy and stakeholder management in procurement related activities, rather than technical procurement skills.

Procurement lifecycle

The PCM is structured around the three phases of the procurement lifecycle and the central procurement policy framework (illustrated in purple text below). These are further broken down into the elements required of procurement professionals within each role type (illustrated in black text below).



Procurement policy within the public sector context

The procurement policy framework is central to all phases of the procurement lifecycle. Procurement professionals should utilise the competencies outlined below to complete activities in the procurement planning, contract formation and contract management phases.

Elements	Procurement Support	Procurement Practitioner	Procurement Specialist	Procurement Executive
Policy and best practice	<ul style="list-style-type: none"> Understands the principles of the WA Procurement Rules and other agency requirements. Understands the principles of value for money and applies them to decision making. Acts with integrity, and complies with policy and best practice in purchasing and straightforward procurement activities. 	<ul style="list-style-type: none"> Applies and advises on the WA Procurement Rules and best practice in procurement. Understands government and agency procurement requirements including Buy Local, engaging Western Australian Disability Enterprises and Registered Aboriginal Businesses, the Delivering Community Services in Partnership (DCSP) policy, and sustainable procurement considerations. Understands, applies and advises on the principles of value for money in decision making. Acts with integrity, and undertakes all procurement activities in line with best practice and complies with policy requirements, and supports others to do the same. Researches issues and analyses data to provide clear advice that enables key procurement decisions to be made in line with policy requirements. 	<ul style="list-style-type: none"> Applies, advises on, and influences decisions based on specialist knowledge of the WA Procurement Rules to drive a value for money outcome. Influences decision making by driving the appropriate application of government and agency procurement requirements around Buy Local, social procurement initiatives, the DCSP policy and sustainable procurement considerations. Acts with integrity, and undertakes all procurement activities in line with best practice and complies with policy requirements, and manages clients and colleagues to do the same. Contributes to the development of agency practices based on a practical understanding of key issues and the broader policy context. Researches complex issues and analyses data to provide clear advice and solutions that enables key procurement decisions to be made in line with policy requirements. 	<ul style="list-style-type: none"> Applies and advises on the WA Procurement Rules and other government procurement requirements including Buy Local, social procurement initiatives, the DCSP policy, and sustainable procurement considerations in complex situations. Acts with integrity, and drives the agency and all business functions to undertake activities that represent best practice, and align with wider legislative and policy requirements. Understands the process for, and impact of, exemption from the WA Procurement Rules. Leverages awareness of key drivers of agency business and relevant analytics capability to enable quality, insightful procurement decisions.
Contract law	<ul style="list-style-type: none"> Interprets straightforward contract terms and conditions. 	<ul style="list-style-type: none"> Interprets contract terms and conditions. Applies foundations of contract law to procurement activities. Proactively escalates issues or seeks advice from legal experts where appropriate. 	<ul style="list-style-type: none"> Interprets and provides support on the application of complex contract terms and conditions. Utilises knowledge of contract law principles to drive procurement activities. Engages with legal representatives or technical experts for support and advice where necessary. 	<ul style="list-style-type: none"> Ensures the application of principles of contract law in procurement and uses knowledge to provide influential advice to senior stakeholders. Engages with senior legal experts on complex contract law matters.
Risk management	<ul style="list-style-type: none"> Identifies and addresses straightforward procurement risks throughout the procurement lifecycle. 	<ul style="list-style-type: none"> Identifies, assesses and manages procurement risks throughout the procurement lifecycle. 	<ul style="list-style-type: none"> Identifies, assesses and manages procurement risks for complex requirements throughout the procurement lifecycle. Engages with stakeholders to manage operational risks including financial, quality, legal and regulatory risks. 	<ul style="list-style-type: none"> Identifies, assesses and manages procurement and operational risks for complex requirements. Leads or directs the development, implementation and ongoing management of consistent strategies and resources for procurement risks across the agency. Promotes a culture of risk management that balances mitigation strategies with innovative solutions.
Governance and systems	<ul style="list-style-type: none"> Applies basic understanding of purchasing and procurement systems and resources available in accordance with predetermined processes. Complies with delegated authority, and understands when and to whom to escalate issues. 	<ul style="list-style-type: none"> Complies with and advises on the agency's procurement procedures and governance mechanisms, including adhering to delegated authority and agency procedures. Utilises and advises on procurement systems and resources. 	<ul style="list-style-type: none"> Complies with, advises on and contributes to the ongoing management of the agency's governance mechanisms, including adhering to delegated authority and agency procedures. Utilises and advises on procurement systems and resources, and proactively supports system enhancements. Contributes to the development and implementation of continuous improvement initiatives for procurement practices. 	<ul style="list-style-type: none"> Develops, implements and manages compliant procurement governance frameworks, systems and delegation schedules to drive appropriate behaviour. Drives the use of effective procurement data and contract management systems across the agency to capture and report on accurate and complete information. Identifies, plans and executes continuous improvement initiatives for procurement practices within existing resource, process and technology constraints.
Procurement strategy	<ul style="list-style-type: none"> Understands the role of procurement within the agency and that external factors impact on procurement strategy. 	<ul style="list-style-type: none"> Understands the role of procurement within the agency and where the function sits in the broader public sector. Understands wider agency and government objectives that affect procurement strategy. Contributes to the development of procurement strategies that align with wider agency and government objectives. 	<ul style="list-style-type: none"> Understands the role of procurement within the agency and the broader public sector, and how to leverage the function as an enabler to deliver strategic objectives. Facilitates the development of procurement strategies for complex requirements that align with wider agency and government objectives. Understands and advises on how external policies, decisions and other factors impact procurement strategy. 	<ul style="list-style-type: none"> Elevates the profile of procurement from a transactional purchasing role to an essential strategic function. Engages senior stakeholders to leverage the procurement function as an enabler to deliver strategic objectives. Influences senior stakeholders to align procurement activities with wider agency and government objectives, whilst balancing short term operational pressures with long term vision.

Procurement planning

The procurement planning phase involves consulting key stakeholders to define requirements, analysing the supply market, and developing the Request. The objective of this phase is to define the procurement strategy which will be followed throughout the procurement lifecycle to ensure the agency's business needs are met.

Elements	Procurement Support	Procurement Practitioner	Procurement Specialist	Procurement Executive
Planning and identification of needs	<ul style="list-style-type: none"> Works with stakeholders to identify straightforward business needs for procurements. Identifies existing agency contracts or Common Use Arrangements (CUAs), utilises where appropriate, and complies with contract requirements. 	<ul style="list-style-type: none"> Works with stakeholders to ensure business needs have been identified, and specifications are clear, concise, complete and accurate. Identifies opportunities for aggregation. Undertakes spend analysis and applies findings to procurement decisions. 	<ul style="list-style-type: none"> Works with various stakeholders to shape and articulate complex business needs and outcomes. Leads the development of the agency's strategic procurement plans and ensures they align with wider strategic objectives. Challenges and offers suggestions to improve procurement activities, where appropriate, including identifying opportunities for aggregation. Explores and assesses appropriate options and tailors actions accordingly, including utilising innovative procurement strategies for complex requirements. Undertakes complex spend analysis and applies the findings to procurement decision and sourcing strategies. 	<ul style="list-style-type: none"> Influences senior stakeholders to adjust procurement strategy based on wider objectives. Drives the agency's forward procurement planning activities. Leverages aggregation opportunities across the agency to deliver savings and create value. Drives the use of innovative procurement strategies where appropriate to deliver the best outcome.
Market analysis	<ul style="list-style-type: none"> Undertakes market research for straightforward requirements. 	<ul style="list-style-type: none"> Undertakes market research in accordance with probity requirements. Understands general market conditions. Adjusts procurement activities to reflect current or predicted market conditions. 	<ul style="list-style-type: none"> Undertakes market research and consults stakeholders to understand technical and commercial aspects of a range of complex business needs. Considers the impact of external influences, such as foreign exchange fluctuations, on procurement activities. Critically analyses market conditions and available data to identify trends and opportunities, and shapes procurement activities accordingly. 	<ul style="list-style-type: none"> Analyses and assesses the impact of local, national and international economic, social and political factors on procurement activities. Considers the impact of community demands, emerging trends, opportunities and competition on the agency's procurement strategy.
Request development	<ul style="list-style-type: none"> Prepares clear, concise and complete Request documentation for straightforward requirements. 	<ul style="list-style-type: none"> Prepares Request documentation that is well-structured and concise, uses appropriate language and contains relevant information. Works with stakeholders to develop qualitative criteria and pricing schedules that are suitable for the procurement and allows for an efficient and fair evaluation process. Incorporates appropriate terms and conditions into the Request that protect the agency. 	<ul style="list-style-type: none"> Prepares Request documentation that is well-structured and concise, uses appropriate language and contains relevant information for complex requirements. Shapes qualitative criteria and pricing schedules that are suitable for the procurement, and allows for an efficient and fair evaluation process. Understands and advises on where it is appropriate to deviate from standard terms and conditions, and seeks legal advice where relevant. 	<ul style="list-style-type: none"> Directs the development of Request documentation for complex or politically sensitive requirements, ensuring it is clear and concise and reflects the requirements of the agency and government.

Contract formation

The contract formation phase includes advertising the Request, the evaluation and negotiation processes, and contract award. The objective of this phase is to establish a contract to enable the delivery of the outcomes required by the agency.

Elements	Procurement Support	Procurement Practitioner	Procurement Specialist	Procurement Executive
Advertise Request and receive offers	<ul style="list-style-type: none"> Complies with agency, contract and government procedures for advertising Requests, and ensures fairness and equity. Understands when to seek technical, legal or procurement advice. 	<ul style="list-style-type: none"> Complies with procedures for advertising Requests, and receiving, recording and distributing offers. Adheres to all probity requirements including security and confidentiality, and ensures fairness and equity. Consistently, accurately and promptly responds to queries, and takes appropriate action including issuing addenda, where necessary. Prepares for and undertakes tender briefings. 	<ul style="list-style-type: none"> Complies with and advises on procedures for advertising Requests, and receiving, recording and distributing offers. Adheres to and advises on all probity requirements including security and confidentiality, and ensures fairness and equity. Consistently, accurately and promptly responds to complex queries, and takes appropriate action including issuing addenda, where necessary. Prepares for and undertakes tender briefings for complex requirements. 	<ul style="list-style-type: none"> Manages political or public interest in complex or contentious tender processes, and ensures relevant stakeholders are kept informed. Manages agency arrangements with tendering services and Tenders WA.
Evaluation	<ul style="list-style-type: none"> Understands and can communicate basic evaluation principles, and supports the evaluation process. Understands the role of a chairperson, voting member and non-voting member. 	<ul style="list-style-type: none"> Advises on and facilitates the evaluation process. Applies the principles of probity, confidentiality, fairness and value for money in the evaluation process, and documents outcomes appropriately. Ensures the evaluation panel consists of sufficiently knowledgeable and skilled panel members. 	<ul style="list-style-type: none"> Advises on and facilitates the evaluation process for complex requirements. Influences stakeholders to make value for money decisions, and documents outcomes appropriately. Engages relevant stakeholders and ensures the evaluation panel consists of sufficiently knowledgeable, skilled and diverse panel members. 	<ul style="list-style-type: none"> Oversees or directs the evaluation process for complex or politically sensitive procurements to ensure compliance with all policy requirements and to drive a value for money outcome.
Negotiate and apply due diligence	<ul style="list-style-type: none"> Provides support for straightforward contractual negotiations. 	<ul style="list-style-type: none"> Facilitates straightforward contractual negotiations. Provides support for complex contractual negotiations. Understands common contractual negotiation issues and solutions, and works with stakeholders to establish negotiation strategies. Applies and advises on basic due diligence processes, and takes action to resolve any issues that arise. 	<ul style="list-style-type: none"> Facilitates complex contractual negotiations. Influences senior stakeholders to use best practice procurement negotiation principles. Works with stakeholders to establish negotiation strategies with clear parameters that are in line with the agency's objectives and within delegated authority. Applies and advises on due diligence processes, and takes action to resolve any issues that arise. 	<ul style="list-style-type: none"> Leads or facilitates complex contractual negotiations for requirements critical to the agency. Uses persuasive arguments to influence others to achieve optimal procurement outcomes, leverages government purchasing power and takes a strong negotiating stance when necessary.
Finalise and award contract	<ul style="list-style-type: none"> Undertakes the contract award process in line with the WA Procurement Rules and agency policies. Understands when and how to use procurement systems, including Tenders WA and agency contract register, to record contract award information. 	<ul style="list-style-type: none"> Applies and advises on the contract award process, including the appropriate use of procurement systems, to ensure compliance with the WA Procurement Rules and agency policies. Prepares for and conducts supplier debriefs. 	<ul style="list-style-type: none"> Applies and advises on the contract award process for complex requirements. Prepares for and conducts challenging supplier debriefs, and resolves issues or disputes that arise. 	<ul style="list-style-type: none"> Conducts or directs sensitive or contentious supplier debriefs that could attract political or public interest. Informs senior executive or government regarding decisions that may result in political or public interest.
Contract handover	<ul style="list-style-type: none"> Supports the contract handover with contract manager. 	<ul style="list-style-type: none"> Prepares for and conducts contract handover with contract manager. Provides support resources and information to assist in the effective management of the contract. 	<ul style="list-style-type: none"> Conducts contract handover with contract manager and provides support resources and information Supports the development of the contract management strategy for complex requirements. 	<ul style="list-style-type: none"> Develops, implements and drives the use of appropriate handover resources and procedures throughout the agency. Advises on the development of the contract management strategy for complex requirements based on risk, the nature of the contract, and its importance to achieving agency and government objectives.

Contract management

The contract management phase formally commences after contract award. The objective of this phase is to ensure all parties fully meet their respective obligations as efficiently and effectively as possible to achieve the contract outcomes. The contract management phase also includes the evaluation of the contract to assist with future requirements.¹

Elements	Procurement Support	Procurement Practitioner	Procurement Specialist	Procurement Executive
Contract operation	<ul style="list-style-type: none"> Administers low-risk contracts including maintaining contractor database, insurance requirements and accuracy of pricing. Monitors and reports on contract milestones and outcomes. Completes price variations in accordance with predetermined processes. 	<ul style="list-style-type: none"> Manages medium-risk contracts including governance, risk, performance and financial management. Adapts contract management practices in changing circumstances whilst maintaining the overall intent of the contract. Interprets and applies the terms and conditions of the contract to varied situations. Monitors contract performance and identifies when corrective action needs to be taken to drive better outcomes. Assesses contract variations, and makes appropriate decisions based on risk. Liaises with stakeholders to identify and document the contract management strategy and responsibilities. 	<ul style="list-style-type: none"> Manages high-risk contracts including governance, risk, performance and financial management. Adapts contract management practices in difficult situations whilst maintaining the overall intent of the contract. Interprets and advises on the terms and conditions of the contract, and applies to varied and complex situations. Monitors, evaluate and report on contract milestones, KPI adherence, performance metrics and outcomes. Develops and advises on solutions to address significant issues. Assesses and advises on contract variations, negotiates and makes sound decisions based on risk. Liaises with stakeholders to develop and document the strategy for managing complex contracts. Explores innovative contract management strategies for complex requirements. 	<ul style="list-style-type: none"> Oversees the management of contracts and categories, and reports on contract activities that may result in political or public interest. Defines and advises on contract management responsibilities and processes across the agency. Drives the use of innovative contract management strategies where appropriate to deliver the best outcome and maximise value.
Supplier relationship management	<ul style="list-style-type: none"> Develops and maintains sound working relationships with suppliers at an operational level, and acts with integrity. 	<ul style="list-style-type: none"> Develops and maintains sound working relationships with suppliers based on trust, commitment and communication. Maintains awareness of integrity imperatives and obligations when dealing with suppliers. Adopts a structured approach to managing supplier relationships. Identifies and leverages sources of value from the relationship. Monitors and reports on supplier performance, taking corrective action where necessary. Knowledge of dispute and escalation processes 	<ul style="list-style-type: none"> Develops and maintains supplier relationships through appropriate and structured management processes based on trust, commitment and communication, whilst maintaining awareness of integrity imperatives and obligations. Leverages supplier relationships to manage risk, address issues, and to ensure contract requirements are being delivered. Applies dispute and escalation processes. 	<ul style="list-style-type: none"> Develops and maintains effective working relationships with senior staff from critical suppliers, and acts with integrity. Leads or directs the development, implementation and ongoing management of mechanisms to ensure supplier relationships are appropriately governed. Achieves the resolution of disputes enabling the delivery of quality outcomes.
Customer relationship management	<ul style="list-style-type: none"> Develops and maintains sound working relationships with customers at an operational level. 	<ul style="list-style-type: none"> Advises customers on using the contract to drive value. Adopts a structured approach to managing relationships with customers, including managing risks and addressing issues. 	<ul style="list-style-type: none"> Advises customers on using the contract to maximise value. Develops and maintains customer relationships through appropriate and structured management processes. Leverages customer relationships to manage risk and address issues. 	<ul style="list-style-type: none"> Develops and maintains effective working relationships with critical customers. Leads or directs the development, implementation and ongoing management of mechanisms to ensure customer relationships are appropriately governed.
Review and evaluate	<ul style="list-style-type: none"> Applies processes for contract review, exercising extension options, contract expiry and transition out. Complies with agency and government disposal procedures. 	<ul style="list-style-type: none"> Applies and advises on processes for exercising extension options, contract expiry and transition management. Reviews and evaluates expiring contracts to determine whether contract outcomes were achieved, and uses results to shape future procurement strategy. Complies with disposal procedures that are ethical, equitable and efficient. 	<ul style="list-style-type: none"> Applies and advises on processes for contract review, extension, expiry and transition management, and delivers solutions to issues arising during these stages. Leads the contract review and stakeholder engagement to shape the procurement strategy for the redevelopment of complex requirements, with the aim of delivering enhanced outcomes. Complies with and advises on disposal procedures that are ethical, equitable and efficient. 	<ul style="list-style-type: none"> Leads or directs the development, implementation and ongoing management of governance and procedures in relation to contract review and transition management across the agency. Informs senior Executive or government on contract outcomes that may result in political or public interest. Direct the disposal procedures for the agency to deliver value in the form of public benefit or financial return.

¹ Please note: the officer undertaking contract management activities may be different to the officer who was responsible for procurement planning and contract formation activities.

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