

What to include in the Forward Plan (Template A)

| No. | Field | Definition | Notes | Up to 12 months | 12-24 Months | 24 Months+ | Details |
|-----|--|--|-------|-----------------|--------------|------------|---------|
| 1 | Reference Number | The unique reference number which a contracting authority will allocate to any commercial activity noted on the pipeline. | | Required | Required | Required | |
| 2 | Business Area | The business area/organisation owner for this contract. | | Required | Required | Required | |
| 3 | Contract Title | The planned or published commercial activity name. | | Required | Required | Required | |
| 4 | Short Description | A short contextual entry on the commercial activity. This must include what is being procured and reference the overarching programme the procurement forms part of, when relevant. | | Required | Required | Required | |
| 5 | Commercial Strategy (anticipated) | The planned commercial approach for the commercial activity. Potential options include: 1. New requirement, 2. Re-procurement (same scope), 3. Re-procurement (different scope), 4. Extension (in contract), 5. Contract amendment. | | Required | Required | Required | |
| 6 | Existing Contract End Date | The date on which the existing contract is due to end, i.e. the first date that the contract needs replacing by. (If this is a new requirement, please leave it blank.) Dates should be expressed as MM/YY | | Required | Required | Required | |

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| 7 | Estimated Procurement Start Date | The planned date of official commencement of the procurement e.g. release of tender or commencement of a further competition under a framework agreement. Dates should be expressed as MM/YY | | Required | Required | Required | |
| 8 | Estimated Contract Commencement Date* | The planned start date on which the contract becomes effective. Dates should be expressed as MM/YY | | Required | Required | Required | |
| 9a | Estimated Contract Length | The estimated duration (in months) of the contract, excluding options to extend. | | Required | Required | Required (but may be subject to change) | |
| 9b | Estimated Extension Option - Length | The estimated total length of extensions options (if applicable). | | Required | Required | | |
| 10a | Estimated Contract Value | The estimated total value of the new contract excluding options to extend. | | Required | Required | Required | |
| 10b | Estimated Extension Option - Value | The estimated value of the extension options, if applicable. (If not applicable, please leave it blank.) | | Required | Required (but may be subject to change) | | |
| 11 | Planned Procurement Sourcing Route | The planned/expected procurement vehicle being used to source the contract, such as Open procedure, purchase from Framework Agreement or Dynamic Purchasing Systems (see Supplementary Definitions). | | Required | Required (but may be subject to change) | | |

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| 12a | Contract, Framework/DPS ID | The ID of the framework that the contracting authority plans to use to procure the contract. e.g framework ID under the Crown Commercial Services. This also includes frameworks by any other providers. | | Required | Required | | |
| 12b | Contract, Framework/DPS Name | Where applicable, the name of the Framework Agreement through which the contracting authority plans to procure the contract. (If not applicable, please enter N/A.) | | Required | | | |
| 12c | Contract, Framework/DPS Lot | If the contracting authority is proposing to use a lot, the name as it appears on the framework providers website. | | Required | | | |
| 13a | Spend Category (CPV) | The procurement classification which is attributed to the commercial activity, in Common Procurement Vocabulary (CPV) format. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32008R0213&from=EN | | Required | Required | Required | |
| 14a | Existing Contract | The name of the existing contract(s) where the commercial activity is intended to replace an existing contract, if applicable. (If this is a new requirement, please enter N/A.) | | Required | Required | Required | |
| 14b | Existing Contract Reference Number | The unique reference number which the contracting authority has allocated to the existing contract, if applicable. (If this is a new requirement, please leave it blank.) | | Required | Required | | |

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| 15 | Main Contact | The name and contact details of the single point of contact (SPOC). This is normally the commercial lead of the activity. | | Required | Required | Required | |
| 16 | Supporting Comments | Additional Comments that Contracting Authorities want to share. | | Required | Required | Required | |
| 17 | Suitability Assessment | Is the opportunity suitable for SMEs (Small to Medium Enterprises) and/or VCSEs (Voluntary, Community and Social Enterprises)? | | Required | Required | Required | |
| 18 | Background and Key Needs Document | <p>Helpful Information on the Contracting Authority, such as spend per year, scope and links to any helpful information (such as strategy, procurement portal etc.).</p> <p>High level basic requirements (as per template) to illustrate what providers would need (such as licenses, accreditations, insurance, turnover threshold etc.).</p> | | Required | Background only or both if known | Background only | |
| 19 | Social Value Model | Which elements of the Social Value Model are being considered during this procurement to create social value and report on social impact. | | Required | Required | | |