

# Invitation to Tender

for

## The Provision of Salary Sacrifice (Personal and Home Technology) Schemes

### National Framework Agreement

**Project Ref: F/004/SAL/17/IB**

#### Tender Process:

Schedule I Open Tender Services	<input checked="" type="checkbox"/>	Schedule I Open Tender Goods	<input type="checkbox"/>
Schedule I Restricted Tender Services	<input type="checkbox"/>	Schedule I Restricted Tender Goods	<input type="checkbox"/>

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## 1. BACKGROUND TO THIS FRAMEWORK AGREEMENT

In the current economic climate it has become increasingly important to look for new ways to implement cost effective strategies to motivate and engage public sector employees and continue to demonstrate the value that employing organisations place on them. As a result The Countess of Chester Hospital NHS Foundation Trust’s Commercial Procurement Service is now looking to further widen and improve the overall benefits package available to the UK public sector based on the newly defined optional remuneration arrangements following the changes announced in the Finance Bill 2017.

This Framework Agreement seeks to establish a framework agreement with two Lots, each Lot having a single supplier, to deliver Optional Remuneration Arrangement (OPRA) benefit schemes that will provide a range of personal and home technology employee benefits in two different ways to suit the needs of Participating Organisations. The two Lots are described below.

### Lot 1 Promotional Windows Based Salary Sacrifice Schemes

Participating Organisations may choose to open multiple windows for salary sacrifice schemes in each year that the framework agreement operates. Promotional windows may be seasonally-based (e.g. Easter, summer holidays, back to school, Christmas) and/or based around particular events, such as major sporting championships. This Lot is designed for Participating Organisations who prefer to concentrate their salary sacrifice schemes around specific events or specific times of the year.

### Lot 2 Always Open Salary Sacrifice Scheme

The salary sacrifice scheme is permanently available to employees of a Participating Organisation. This allows employees to take advantage of the scheme at a time which suits them.

This Framework Agreement opportunity encourages smaller businesses (SME’s) to participate. As such the procurement process has been simplified to encourage greater participation. This Framework Agreement will greatly reduce the ongoing administrative burden of repeating multiple procurement processes for the services described within this ITT. This Framework Agreement will therefore support public procurement and private enterprise through its efficiency.

The Countess of Chester Hospital NHS Foundation Trust’s Commercial Procurement Service anticipates appointing the highest scoring Tenderer in each Lot (which has met the minimum requirements which are set out in these ITT documents) to supply the services detailed within that Lot of the specification at SCHEDULE A FRAMEWORK AGREEMENT SPECIFICATION.

## 2. BACKGROUND TO THE COUNTESS OF CHESTER HOSPITAL NHS FOUNDATION TRUST COMMERCIAL PROCUREMENT SERVICE.

The Countess of Chester Hospital NHS Foundation Trust (the Trust) is comprised of a 600 bed acute general hospital located on the outskirts of the City of Chester, an 86 bed community based hospital located in Ellesmere Port, a number of West Cheshire community based health clinics and a shared service Microbiology Laboratory in Wirral.

The Trust also hosts a Commercial Procurement Service which not only undertakes its own commercial activity but seeks to act to the wider public sector to promote and develop smaller innovative businesses and ideas. Further information can be obtained from the website [www.coch-cps.co.uk](http://www.coch-cps.co.uk)

The Countess of Chester Hospital NHS Foundation Trust as the Framework Manager will administer the framework agreement, provide guidance to Participating Authorities and issue draft contracts for consideration between Participating Authorities and the successful supplier. In the first instance of any dispute the Framework Manager will offer first line mediation.

## 3. BACKGROUND TO THE PUBLIC SECTOR AND NHS

The public sector in the United Kingdom (UK) is comprised of many organisations. These include: ministries or departments of central government such as the Cabinet Office, Department of Health (including the National Health Service (NHS)) and Ministry of Justice; local authorities, such as councils and social services; wider public bodies such as fire and rescue services, police authority services, educational authorities, universities and public broadcasting; and utilities agents, such as water authorities. UK public sector procurement bodies must comply with the Public Procurement Regulations, as derived from European Union (EU) treaty principles. These mandate a regulated contract and tender procedure for opportunities above a certain financial threshold, which varies depending on the type of organisation and type of procurement being undertaken.

The National Health Service (NHS) in the UK is representative of over 400 health organisations including Hospital Trusts, Mental Health Trusts, Ambulance Trusts, Foundation Trusts, Clinical Commissioning Groups, Commercial Support Units and Community Health Trusts. The landscape is one of constant evolution and change.

To promote transparency, The Countess of Chester Hospital NHS Foundation Trust wishes to establish a Framework Agreement for use by all UK public sector bodies (and any future successors to these organisations). To provide bidders with information on potential users of the Framework Agreement the following organisations are considered the core client base:

Central Government Departments, Local Government and Public Corporations that can be accessed at the Public Sector Classification Guide:

<https://www.ons.gov.uk/economy/nationalaccounts/uksectoraccounts/datasets/publicsectorclassificationguide>

Please note Central Government departments may be subject to Government Digital Service approval before using the Framework Agreement.

Local Authorities (England and Wales)

<http://www.local.gov.uk/digital-councils/connect/a-z-councils-online>

[www.ubico.co.uk](http://www.ubico.co.uk)

Non-Departmental Public Bodies (NDPDs)

<https://www.gov.uk/government/organisations>

National Parks Authorities

<http://www.nationalparks.gov.uk/>

Educational Establishments in England and Wales, maintained by the Department for Children, Schools and Families including Schools, Universities and Colleges but not Independent Schools

<http://www.education.gov.uk/edubase/home.xhtml>

Police Forces in the United Kingdom

<https://www.police.uk/contact/force-websites/>

Police Forces and Special Police Forces in the United Kingdom, and/or Police and Crime Commissioners (as defined by the Police Reform and Social Responsibility Act 2011) and/or the Police Authorities (as defined in the Police Act 1964, Police Act 1996, Serious Organised Crime and Police Act 2005, Police and Justice Act 2006, Police, Public Order and Criminal Justice (Scotland) Act 2006), and other relevant legislation for the constituent parts of the United Kingdom, for their respective rights and interests

Fire and Rescue Services in the United Kingdom

<http://www.fireservice.co.uk/information/ukfrs>

<http://www.nifrs.org/areas-districts/>

<http://www.firescotland.gov.uk/your-area.aspx>

NHS Bodies England

<http://www.nhs.uk/ServiceDirectories/Pages/AcuteTrustListing.aspx>

<http://www.nhs.uk/ServiceDirectories/Pages/CCGListing.aspx>

<http://www.nhs.uk/ServiceDirectories/Pages/MentalHealthTrustListing.aspx>

<http://www.nhs.uk/ServiceDirectories/Pages/CareTrustListing.aspx>

<http://www.nhs.uk/ServiceDirectories/Pages/AreaTeamListing.aspx>

<http://www.nhs.uk/ServiceDirectories/Pages/SpecialHealthAuthorityListing.aspx>

<http://www.nhs.uk/ServiceDirectories/Pages/OtherListing.aspx>

Hospices in the UK

<https://www.hospiceuk.org/about-hospice-care/find-a-hospice?qclid=CPLU3cD7zdECFdaRGwodNeoDyw>

Registered Social Landlords (Housing Associations)

<https://www.gov.uk/government/publications/current-registered-providers-of-social-housing>

Third Sector and Charities in the United Kingdom

<http://www.charitycommission.gov.uk/find-charities/>

<http://www.oscr.org.uk/search-charity-register/>

<http://www.charitycommissionni.org.uk/charity-search/>

Citizens Advice in the United Kingdom

<http://www.citizensadvice.org.uk/index/getadvice.htm>

[www.cas.org.uk](http://www.cas.org.uk)

<http://www.citizensadvice.co.uk/>

Scottish Public Bodies

The framework agreement will be available for use by any Scottish Public Sector Body: the Authority; Scottish Non-Departmental Public Bodies; offices in the Scottish Administration which are not ministerial offices; cross-border public authorities within the meaning of section 88(5) of the Scotland Act 1998; the Scotland Office; the Scottish Parliamentary Corporate Body; councils constituted under section 2 of the Local Government etc. (Scotland) Act 1994 (except where they are acting in their capacity as educational authority); Scottish joint fire boards or joint fire and rescue boards; Scottish joint police boards or any successor National Police or Fire Authority; Scottish National Park authorities, bodies registered as social landlords under the Housing (Scotland) Act 2001, Scottish health boards or special health boards, Student Loans Company Limited, Northern Lighthouse Board, further or higher education institutions being fundable bodies within the meaning of section 6 of the Further and Higher Education (Scotland) Act 2005 any public body established by or under the Scotland Act 1998 or any Act of the Scottish Parliament, any association of or formed by one or more of the foregoing, bodies financed wholly or mainly by one or more of the foregoing, bodies subject to management supervision by one or more of the foregoing and bodies more than half of the board of directors or members of which, or, in the case of a group of individuals, more than half of those individuals, being appointed by one or more of the foregoing.

Scottish Government

<http://www.gov.scot>

Scottish Parliament

<http://www.scottish.parliament.uk/abouttheparliament/27110.aspx>

Scottish Local Authorities

<http://www.gov.scot/About/Government/councils>

<http://www.scotland-excel.org.uk/home/Aboutus/Ourmembers/Associate-members.aspx>

Scottish Agencies, NDPBs

<http://www.gov.scot/Topics/Government/public-bodies/about/Bodies>

Scottish NHS Bodies

<http://www.gov.scot/Topics/Health/NHS-Workforce/NHS-Boards>

<http://www.show.scot.nhs.uk/organisations/>

Scottish Further and Higher Education Bodies

<http://www.universities-scotland.ac.uk/index.php?page=members>

<http://www.collegesscotland.ac.uk/member-colleges.html>

[http://www.sfc.ac.uk/aboutus/council\\_funded\\_institutions/WhoWeFundColleges.aspx](http://www.sfc.ac.uk/aboutus/council_funded_institutions/WhoWeFundColleges.aspx)

Scottish Police

<http://www.scotland.police.uk/your-community/>

Scottish Housing Associations

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[http://www.sfha.co.uk/component/option,com\\_membersdir/Itemid,149/view,membersdir/](http://www.sfha.co.uk/component/option,com_membersdir/Itemid,149/view,membersdir/)

The Scotland Office

<https://www.gov.uk/government/organisations/scotland-office>

Registered Social Landlords (Housing Associations) - Scotland

<http://directory.scottishhousingregulator.gov.uk/pages/default.aspx>

Scottish Primary Schools

<http://www.educationscotland.gov.uk/parentzone/myschool/findaschool/index.asp>

Scottish Secondary Schools

<http://www.educationscotland.gov.uk/parentzone/myschool/findaschool/index.asp>

Scottish Special Schools

<http://www.educationscotland.gov.uk/parentzone/myschool/findaschool/index.asp>

Welsh Public Bodies

National Assembly for Wales, Welsh Assembly Government and Welsh Local Authorities, and all bodies covered by:

<http://www.assembly.wales/en/Pages/Home.aspx>

<http://gov.wales>

NHS Wales

<http://www.wales.nhs.uk/ourservices/directory>

Housing Associations – Registered Social Landlords Wales

<http://gov.wales/topics/housing-and-regeneration/publications/registered-social-landlords-in-wales/?lang=en>

Universities in Wales

<http://www.uniswales.ac.uk/universities/>

Colleges in Wales

<http://www.collegeswales.ac.uk/Find-a-College>

Schools in Wales (nursery, primary, middle, secondary, special, independent schools and pupil referral units)

<http://gov.wales/statistics-and-research/address-list-of-schools/?lang=en>

Northern Ireland Public Bodies

Northern Ireland Government Departments

<http://www.northernireland.gov.uk/gov.htm>

Northern Ireland Public Sector Bodies and Local Authorities

<https://www.nidirect.gov.uk/contacts/contacts-az/general-register-office-northern-ireland>

Schools in Northern Ireland

<http://apps.education-ni.gov.uk/appinstitutes/instmain.aspx>

Universities in Northern Ireland

<https://www.nidirect.gov.uk/articles/universities-and-colleges-northern-ireland>

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Health and Social care in Northern Ireland

<http://www.hscni.net/>

Northern Ireland Housing Associations

[http://www.nihe.gov.uk/index/about/contact\\_us\\_home/your\\_nearest\\_office.htm](http://www.nihe.gov.uk/index/about/contact_us_home/your_nearest_office.htm)

Police Service of Northern Ireland

<http://www.psnipolice.uk/index.htm>

Any corporation established, or a group of individuals appointed to act together, for the specific purpose of meeting needs in the general interest, not having an industrial or commercial character, and (i) financed wholly or mainly by another contracting authority listed above in this section of this ITT;

(ii) subject to management supervision by another contracting authority listed above in this section of this ITT; or

(iii) more than half of the board of directors or members of which, or, in the case of a group of individuals, more than half of those individuals, are appointed by another contracting authority listed above in this section of this ITT

(iv) an association of or formed by one or more of the Contracting Authorities listed above in this section of this ITT

Entities which are not public sector bodies may also use the Framework Agreements if the Authority is satisfied that:

- such entity is calling-off goods and/or services directly, solely and exclusively in order to satisfy contractual obligations to one or more public sector bodies, all of which are entitled to use the Framework Agreements on their own account;
- all goods to be called-off by it are to be used directly, solely and exclusively to provide goods and/or services at sites occupied by such public sector body(ies); and
- it will pass the benefit of the call-off contract to such public sector body(ies) directly, in full and on a purely “pass-through” basis. Accordingly there must be no mark-up, management fee, service charge or any similar cost solely in relation to the supply of goods and/or services imposed on the relevant public sector body(ies), who must be able to benefit from the terms of the Framework Agreements in a like manner and to the same extent as if using the Framework Agreements on its/their own account.

Any ‘bodies governed by public law’ which under the Public Contracts Regulations 2015 means bodies that have all of the following characteristics

(a) they are established for the specific purpose of meeting needs in the general interest, not having an industrial or commercial character;

(b) they have legal personality; and

(c) they have any of the following characteristics:—

- (i) they are financed, for the most part, by the State, regional or local authorities, or by other bodies governed by public law;
- (ii) they are subject to management supervision by those authorities or bodies; or

- (iii) they have an administrative, managerial or supervisory board, more than half of whose members are appointed by the State, regional or local authorities, or by other bodies governed by public law.

## 4. HOW THE FRAMEWORK WILL OPERATE

This Framework Agreement will be a single supplier Framework Agreement and as such no further competition will be required once awarded. Participating Authorities wishing to call-off from the Framework Agreement may engage directly with the successful Supplier in the chosen Lot and finalise their requirements based on local factors. The Framework Agreement will run for a four year term; however call-off Contracts may exceed this period provided that Contracts are awarded within the Framework Agreement term.

The following outlines a high level process of how parties will engage each other:

1. The successful Supplier canvasses potential Client Organisations to generate interest.
2. Interested Client Organisations will be directed to information about this Framework Agreement.
3. Client Organisations can then liaise directly with the Framework Manager to satisfy themselves that the Framework Agreement meets their need.
4. The Framework Manager will issue the Client Organisations with a briefing pack and a copy of the Framework Agreement.
5. The Client Organisations determine the most appropriate Lot under which to award a call-off contract, determined by local factors.
6. The Client Organisations award a call-off contract. At this point, the Client Organisation will be referred to as a Participating Authority. Please see section 12 below for details of the process that Client Organisations will follow to award a call off contract.
7. The Framework Manager will issue the Participating Authority with a unique reference number which the Participating Authority can use to call-off the services under this Framework Agreement. Participating Authorities attempting to engage the successful Supplier without the unique reference number are doing so outside of the remit of this Framework Agreement and as such the Framework Manager can offer no assurance on legal compliance.
8. The Participating Authority may use the model contract templates as developed within this Framework Agreement.
9. The Framework Manager will monitor expenditure through the successful Supplier's management reports. Management fees as detailed within this ITT will be invoiced based on this information at the rate and frequency stated.

## 5. HOW THIS INVITATION TO TENDER PROCESS WILL WORK.

### Open Procedure

Following the close of the ITT period, bids will be opened by the assessment panel. Where prerequisites have been applied, these will be assessed as the first stage of the evaluation. Failure to meet any prerequisite will result in your bid being immediately rejected. If all prerequisites are satisfied, your bid will be assessed using the award criteria laid out in this Invitation to Tender. Each Lot will be evaluated separately. Following the conclusion of the evaluation, you will be issued notification of either being successful or unsuccessful. This will be accompanied by a debrief letter advising you of your scores and if appropriate the scores of the winning bid(s), along with narrative as to how the scores were applied and the

characteristics and relative advantages of the winning bids. A minimum 10 calendar day standstill period will follow prior to concluding the Framework Agreement which will be formed upon the exchange and signing of Framework Agreement documents. Where a single Tender is received, no standstill period will be required. Following the signing of the Framework Agreement documents an Award notice will be published in the Official Journal of the European Union and on the UK Government's Contracts Finder website.

## 6. TIMETABLE

Tenderers should note that the dates listed below are indicative only and The Countess of Chester Hospital Commercial Procurement Services reserves the right to vary this timetable at its absolute discretion.

Description	Date/Period
Invitation To Tender closing date and time.	1400 BST on 9 October 2017
Opening of Tenders and commencement of evaluation process.	10 October 2017
Notification of intent to award. Standstill period begins.	20 October 2017
Framework Agreement conclusion and launch date.	31 October 2017

## 7. INVITATION TO TENDER

### 7.1 Bidders/Tenderers

In this ITT the terms “Bidder” and “Tenderer” are used interchangeably to indicate an organisation that is participating in this tender process. The term “Supplier” refers to a successful Tenderer following the Framework Agreement award.

The terms Bid and Tender are similarly used interchangeably.

### 7.2 Contracting Authorities

The Countess of Chester Hospital NHS Foundation Trust, hereafter referred to as the "Framework Manager", invites competitively tendered offers in accordance with the attached Tender Documents as listed in the list of Appendices to this Invitation to tender.

In this ITT the terms “Participating Authority”, “Client Organisation” and “Customer” are used interchangeably to indicate an organisation that may utilise this Framework Agreement.

### 7.3 Acceptance of bids

The Framework Manager does not bind itself to accept the lowest or any offer and reserves the right to accept an offer either in whole or in part each item being for this purpose treated as offered separately. The Framework Manager reserves the right to award the Framework Agreement for the supply of the services described within and arising out of this procurement process to more than one Supplier. The Framework Manager reserves the right to make no award in either or both Lots of the Framework Agreement.

Tenderers are advised to read this Invitation to Tender and all supporting documentation very carefully to ensure they are familiar with the nature and extent of the obligations to be accepted by them if their Tender is successful.

## 8. COMMUNICATION

### 8.1 Clarification Questions from Bidders

**Any questions which the Bidder wishes to raise in relation to this Invitation To Tender should be made via the e-sourcing portal messaging system. Questions provided in other formats will not be considered or answered.**

**The last date and time for the submission of Clarification Questions is 4 October 2017 at 1700 BST.**

The Framework Manager is under no obligation to respond to any question received after this time and date. However, the Framework Manager reserves the right to respond to any questions received after this deadline at its absolute discretion.

Should a Tenderer be in any doubt as to the interpretation of any or all parts of the ITT document, have commercial queries or technical/clinical queries prior to the submission of Tenders, these should also be directed via submission of written questions through the e-sourcing portal. The Framework Manager will refer the query to the relevant person for resolution, and will communicate the decision to the Tenderer in writing via the e-sourcing portal.

**Clarification questions received by any other method may constitute canvassing as defined in this ITT. Organisations participating in a bid submission are therefore strongly advised to ensure that any communication with the Countess of Chester Hospital NHS Foundation Trust and/or its employees about or related to this procurement process is submitted through the e-sourcing portal only, as failure to do so may result in their bid submission being disqualified.**

Bidders are reminded that their questions, and the Framework Manager's responses, will normally be circulated to all Bidders in an anonymised form, in order to treat all Bidders fairly. This will be provided in digest form, periodically updated and uploaded to the e-sourcing portal for all Bidders to view who have registered for the procurement. Provision will be made for Bidders to request clarification in confidence but in responding to such requests the Framework Manager will reserve the right to act in what it considers a fair manner and in the best interests of the procurement, which may include uploading to the e-sourcing portal and/or circulating the response to all Bidders.

## **8.2 Clarification Questions from Framework Manager**

The Framework Manager reserves the right to require Bidders to clarify their bid submissions. Any such request will be made via the e-sourcing portal to the Bidder's nominated representative. The Framework Manager will retain a general discretion in relation to this procurement process, at any stage of this procurement process, to seek clarification from any Bidder in relation to any aspect of the bid submission.

It is likely that any response to a clarification question will be required within two working days of request. Failure to respond adequately or in a timely manner to clarification questions may result in a potential Bidder not being considered further in the procurement.

The Framework Manager may contact (or may require the Bidder to contact on its behalf) any of the customers, subcontractors or consortium members to whom information relates in a response or bid, to ask that they testify that information supplied is accurate and true.

The Framework Manager reserves the right to seek third party independent advice or assistance to validate information submitted by a Bidder and/or to assist in the bid evaluation process.

The Framework Manager reserves the right to conduct site visits and/or audits at any time during this procurement process.

## **9. RETURN OF BIDS**

Tenderers must return bids via the web site [www.nhssourcing.co.uk](http://www.nhssourcing.co.uk); hard copies will not be accepted. It is the sole responsibility of the Tenderer to ensure their offer is received on time. Tenders received after the due date cannot normally be accepted

The Framework Manager intends to award the Framework Agreement to the Bidder who submits the most economically advantageous tender for each Lot as determined by applying the evaluation criteria set out in this ITT. However, the Framework Manager reserves the right not to award all or any of the Framework Agreement to the most economically advantageous bid or to any bidder. The Framework Manager also reserves the right to award the Framework Agreement to more than one bidder.

The Framework Manager does not bind itself to accept the lowest or any offer and reserves the right to accept an offer either in whole or in part.

## 9.1 The closing date for the return of Tenders is 9 October 2017 1400 BST

Failure to return a completed tender by the closing date specified will entitle The Framework Manager to disqualify the relevant Bidder from participating in this procurement.

Those Bidders deciding not to tender should use the “Decline to Respond” function on the Trust e-procurement portal, and provide a reason for this decision.

## 10. CONTRACT AWARD PROCESS AND EVALUATION CRITERIA

The Framework Agreement will be awarded on the basis of the most economically advantageous tender in each Lot which will be evaluated on the following:

### Lot 1

Criterion	Weighting %
Commercial	15%
Range of products	15%
Benefit to organisation and employees	15%
Ordering and delivery process	15%
Online portal	15%
Taxation and regulatory compliance	15%
Implementation and marketing	10%
Total	100%

### Lot 2

Criterion	Weighting %
Commercial	15%
Range of products	15%
Benefit to organisation and employees	15%
Ordering and delivery process	15%
Online portal	15%
Taxation and regulatory compliance	15%
Implementation and marketing	10%
Total	100%

### 10.1 STEP 1: PREREQUISITES

10.1.1 Applicants must meet all of the requirements of SCHEDULE C PREREQUISITES. Any Applicants which do not meet all of the selection requirements set out in the prerequisites as found in SCHEDULE C PREREQUISITES (or (1) submit their European Single Procurement Document, which must be completed in full (together with any further information which is required in the prerequisites but not in the European Single Procurement Document); or (2) explain to The Countess of Chester

Hospital Commercial Procurement Services' satisfaction why they do not perhaps through the use of self-cleaning evidence) will be treated as ineligible for the Framework Agreement, their Tender will not be evaluated further and the Applicant will be informed of their rejection at this stage. Prerequisites will be evaluated across both Lots.

10.1.2 Applicants who have met prerequisites will move to step 2.

## 10.2 STEP 2: EVALUATION OF TECHNICAL INFORMATION

10.2.1 Technical information will be evaluated using the criteria and weightings below. Each Lot will be evaluated separately.

### Lot 1

Technical Criterion	Weighting %
Range of products	15%
Benefit to organisation and employees	15%
Ordering and delivery process	15%
Online portal	15%
Taxation and regulatory compliance	15%
Implementation and marketing	10%
Total non-financial criteria	85%

### Lot 2

Technical Criterion	Weighting %
Range of products	15%
Benefit to organisation and employees	15%
Ordering and delivery process	15%
Online portal	15%
Taxation and regulatory compliance	15%
Implementation and marketing	10%
Total non-financial criteria	85%

10.2.2 Applicants are required to answer a number of questions found in the appropriate SCHEDULE D TECHNICAL SCHEDULE, which are linked to the criteria listed above.

10.2.3 Each question has been assigned a maximum score, which is provided in the appropriate SCHEDULE D TECHNICAL SCHEDULE. The following methodology will apply where qualitative information is provided. Bidders are unable to contest the application of this methodology as it forms the subjective opinion of the Awarding Authority:

Rate	Qualifier
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0	No Confidence
1	Serious concerns
2	Concerns, Some Confidence
3	Acceptable, Confident
4	Exceptionally Confident

10.2.4 The evaluation of technical information will be undertaken once per Lot, and the resulting score used in the calculation of the final score described in step 4 below. Each Lot will be evaluated separately.

### 10.3 STEP 3: COMMERCIAL EVALUATION

10.3.1 The commercial evaluation for each Lot is based on an indicative scenario of a hypothetical client's requirements as listed in the appropriate SCHEDULE E COMMERCIAL SCHEDULE, using the weighting below.

#### Lot 1

Commercial evaluation scenarios	Weighting
Scenario	15%
<b>Total commercial weighting</b>	<b>15%</b>

#### Lot 2

Commercial evaluation scenarios	Weighting
Scenario	15%
<b>Total commercial weighting</b>	<b>15%</b>

10.3.2 Bidders are required to provide for this scenario within the appropriate SCHEDULE E COMMERCIAL SCHEDULE the total cost for a Participating Authority of the whole indicative basket of goods. These costs will be evaluated as follows:

10.3.3 Each product in the scenario is located on a separate tab within the appropriate SCHEDULE E COMMERCIAL SCHEDULE and the cost to the Participating Authority should be detailed in the relevant tab. Pricing requested in all tabs should be completed.

10.3.4 The total cost of product to the employer will be summed in each tab.

10.3.5 The total cost of product to the employer within each tab will then be added together to provide a total cost of product to the employer for each Bidder.

The Bidder with the lowest total cost of product to the employer in each Lot will receive the full 15% commercial score for that Lot. Tenders with higher total costs will gain a percentage of the 15% commercial score for that scenario on a pro-rata basis from the top scoring price. This is calculated using the following formula:

$$\text{Commercial Score} = 15 \times (\text{Lowest total cost} / \text{Bidder total cost})$$

where

Lowest total cost = the lowest total cost provided for the scenario.

Bidder total cost = the total price offered by the Bidder for the scenario.

Bidders are also required to provide a full electronic catalogue of all products available, which will be made available to Participating Authorities under this Framework Agreement, in the appropriate SCHEDULE E COMMERCIAL SCHEDULE. These prices will not be used for evaluation of award to the Framework Agreement but should enable Participating Authorities to determine the cost of using the Supplier as their provider of a Salary Sacrifice scheme or schemes.

#### **10.4 STEP 4: CALCULATION OF FINAL SCORES AND AWARD OF FRAMEWORK AGREEMENT**

10.4.1 Once the commercial and technical criteria have been assessed, the final scores for each Lot will be calculated as follows:

The Bidder's technical score for the Lot as calculated in step 2 will be added to the commercial score for the Lot as calculated in step 3, to produce a total score for each Bidder in the Lot.

The bidder with the highest total score for the Lot will be nominated for award to that Lot of the Framework Agreement.

## **11. CONDITIONS OF TENDER**

### **1. Information and Confidentiality**

1.1 This ITT is intended for the exclusive use of the Bidder and is provided on the express understanding that this ITT and the information contained in it or, provided in connection with it, will be regarded and treated as strictly confidential. This ITT and all related materials may not be reproduced in whole or in part nor furnished to any other persons other than the bidder, save for the purpose of:

- taking legal or other advice in connection with completing the ITT; and/or

- obtaining input from relevant organisations relevant to the Bidder's response to the ITT; and/or
- obtaining input from any other parties who the Bidder demonstrates will provide information relevant to the ITT response but subject always to the prior written consent of the Framework Manager to such disclosure (which they may withhold in their absolute discretion).

In each of the above cases, the Bidder must obtain confidentiality undertakings from any such parties prior to disclosure of at least equivalent strength to those set out above.

Upon written request from the Framework Manager, the Bidder shall promptly provide evidence to Framework Manager that such undertakings have been provided to the Bidder.

- 1.2 The Bidder must ensure that, to the best of its knowledge and belief, the information contained in its tender response is accurate and contains no material misrepresentation.
- 1.3 This invitation and its accompanying documents shall remain the property of Framework Manager and must be returned on demand.
- 1.4 Any notice to a Tenderer required under these Conditions to be given in writing, shall be deemed to be duly served at the time of actual delivery if delivered to a physical address, or at the time of posting on the e-sourcing portal if communicated via the e-sourcing portal to the Bidder's nominated representative, or at the time of delivery in ordinary course of post if posted in a prepaid envelope addressed to the Tenderer by name, to the Tenderer's last known place of abode or business or, in the case of a company, the registered office of the company.
- 1.5 Estimated quantities, where inserted in the Invitation to Tender document, shall indicate only the probable requirements for the period referred to and the Contracting Authority shall not be bound to order such quantities.

## **2. Freedom of Information and other information disclosures**

- 2.1 The Framework Manager is committed to open government and meeting legal responsibilities under the Freedom of Information Act 2000 (FOIA) as amended. Accordingly, any information created by or submitted to the Framework Manager (including the information contained in the Tender and the submissions received from Bidders in response) may need to be disclosed by the Framework Manager in response to a request for information.
- 2.2 The Framework Manager may also decide to include certain information in their relevant publication scheme maintained under the FOIA. In making a submission, each bidder therefore acknowledges and accepts that the information contained therein may be disclosed under the FOIA.
- 2.3 Bidders must clearly identify any information supplied in response to the Tender, which they consider to be confidential or commercially sensitive and attach a brief statement of reasons why such information should be so treated and for what time period.

- 2.4 However, Bidders should be aware that even where a Bidder has indicated that information is commercially sensitive, the Framework Manager is responsible for determining at their absolute discretion whether such information is exempt from disclosure under the FOIA, or must be disclosed in response to a request for information.
- 2.5 Bidders should also note that the receipt by the Framework Manager of any information marked “confidential” or equivalent does not mean that the Framework Manager accepts any duty of confidence by virtue of that marking, and that the Framework Manager has the final decision regarding the disclosure of any such information in response to a Request for Information.
- 2.6 In making a submission in response to this Tender, each Bidder acknowledges that the Framework Manager may be obliged under the FOIA to disclose any information provided to it:
- Without consulting the Bidder; or
  - Following consultation with the Bidder and having taken its views into account.
- 2.7 Bidders acknowledge that the Framework Manager may be subject to the Environmental Information Regulations 2004 (EIR) as amended and shall assist and co-operate with the Framework Manager (at the Bidder’s expense) to enable the Framework Manager to comply with its information disclosure requirements contained in this legislation.
- 2.8 Bidders should be aware of the Framework Manager’s obligations and responsibilities under the EIR to disclose, on request, recorded information held by the Framework Manager. Information provided by Bidders in connection with this procurement process, or any contract that may be awarded as a result of this process, may therefore have to be disclosed by the Framework Manager in response to such a request, unless the Framework Manager decides that one of the statutory exemptions under the EIR applies.

The Framework Manager shall be responsible for determining, at its absolute discretion, whether the information submitted by a Bidder is exempt from disclosure in accordance with the provisions of the EIR.

- 2.9 Bidders acknowledge that the Framework Manager and/or its members may be subject to the Government’s public sector purchasing transparency requirements and that the Framework Manager and/or its members may be required to publish on a Government on line portal or otherwise details of this procurement process, including but not limited to the process documentation and the contract awarded.

### **3. Prices**

- 3.1 Prices in SCHEDULE E COMMERCIAL SCHEDULE must remain open for acceptance until 90 days from the closing date for the receipt of Tenders.
- 3.2 Prices in SCHEDULE E COMMERCIAL SCHEDULE must be firm (i.e. not subject to variation) for the period of 2 years. Any proposed amendments to the fixed period will be rejected.
- 3.3 Where a fixed price period ends and triggers a contract extension option, price variations must be accompanied by evidence to justify the change in price. References to standard inflationary indices are not acceptable. It is expected that

successful suppliers will mitigate any price increases through structured business development and efficiency planning.

- 3.4 Where the accumulated costs materially exceed the advertised contract value (as published in the Award notice, the Framework Manager reserves the right to terminate and re-advertise the Framework Agreement.
- 3.5 Prices submitted as part of SCHEDULE E COMMERCIAL SCHEDULE should be considered capped pricing and under no circumstances should prices for any call-off exceed the unit cost per good or service exceed this. Final prices may be below this cap based on a client's specific requirements.

## 4. Tender Documentation and Submission

- 4.1 Tenders must be for the supply of the whole of the specification for the appropriate Lot upon the Terms and Conditions of the Contract. Tenders for part or parts only of the specification for a Lot or for different standards or frequencies or made subject to alternative terms or conditions may be rejected.
- 4.2 The services offered should be strictly in accordance with the Specification. Alternative services may be offered but all differences between such items and the Specification must be indicated in detail in your response to SCHEDULE D TECHNICAL SCHEDULE.

Tenders must comprise of the following completed documents:

- the appropriate Technical Schedule;
  - the appropriate Commercial Schedule;
  - the Prerequisites;
  - the Form of Offer;
  - the Certificate of Non-Canvassing.
- 4.3 The Form of Offer must be signed by an authorised signatory, scanned and uploaded into the e-sourcing portal where indicated. In the case of a partnership, by a partner for and on behalf of the partnership; in the case of a limited company, by an officer duly authorised, the designation of the officer being stated. Any signature included in the Tender will be deemed to be from an authorised person.
  - 4.4 The Tender must be completed in full. Any Tender may be rejected which:
    - contains gaps, omissions or obvious errors; or
    - contains amendments which have not been initialled by the authorised signatory; or
    - is received after the closing time.
  - 4.5 Contact the Framework Manager via the e-sourcing portal for help in completing the Tender in compliance with the requirements of this ITT.
  - 4.6 Offers must be written in English and submitted via the Framework Manager's e-sourcing portal at [www.nhssourcing.co.uk](http://www.nhssourcing.co.uk)
  - 4.7 The Framework Manager may, at its own absolute discretion extend the closing date and time specified above without request. Any extension granted will apply to all Tenderers.

## 5. Rebates/Commissions

- 5.1 In any application of rebates and commissions, Tenderers will be treated fairly and equitably within their markets. Furthermore, agreement will be reached between both parties on the process for relating payments to contractual activity. The Supplier will be expected to submit sales activity on a monthly basis and invoices will also be issued monthly.
- 5.2 The purposes of rebates and commissions are the promotion and management of the Framework Agreement and as such should benefit both the Framework Supplier and the Framework Manager. All fees set out below are payable by the supplier to the Framework Manager, Commercial Procurement Services.
- 5.3 There will be a Framework Agreement award fee of £10,000 - not discountable against any other fees charged to the supplier by the Framework Manager. If Lot 1 and Lot 2 are awarded to different Suppliers, this fee will be split equally between both Suppliers awarded a place on the Framework Agreement. Invoices will be issued following the signing of the Framework Agreement and will be due within 30 days.
- 5.4 There will be an annual fee equal to that paid in the award fee (due on each anniversary of the Framework Agreement letting date). If Lot 1 and Lot 2 are awarded to different Suppliers, this fee will be split equally between both Suppliers awarded a place on the Framework Agreement. This fee will be discounted by the amount of business success charged (as outline in 5.5) in the previous 12 months.
- 5.5 Business success charge – this will be 1.5% of the turnover of each call off Contract awarded under either Lot of the Framework Agreement. The business success charge will be paid by the Supplier to the Framework Manager for the duration of each call off contract. Call off contracts may exceed the Framework Agreement expiry date and in such cases the business success charges will continue to be paid until the call off contract expiry date.
- 6. Table-top trials**  (only applicable to the Tender if this box is checked)
- 6.1 Table-top trials will be used to assess a product's quality against its described characteristics in the Bidder's response documents as highlighted in the award sub-criteria. Table-top trials are intended to be used to assess products with minimum disruption to our staff and patients and as such will not be trialled in a live clinical environment. All Bidders are required to submit any products related to this ITT as requested by the Framework Manager within the timescales advised by the Framework Manager. Failure to provide adequate trial material will result in receiving a score of zero in the appropriate award section of the evaluation. Samples will be requested under clarification requirements where initial scoring is 2 or less.
- 6.2 The Authority is not bound to accept the lowest or any offer.
- 6.3 Following the Tender evaluation all bidders will be notified of the outcome. This notification will be accompanied by a debrief letter. No further debrief will be given outside of the information contained within this letter
- 7. TUPE**  (only applicable to the Tender if this box is checked)

- 7.1 The attention of Tenderers is drawn to the provisions of the European Acquired Rights Directive EC77/187 and TUPE (Transfer of Undertakings Protection of Employment Regulations). TUPE may apply to the transfer of the Contract from the present supplier to the new one, giving the present supplier's staff (and possibly also staff employed by any present sub-contractors) the right to transfer to the employment of the successful Tenderer on the same terms and conditions. The above does not apply to the self-employed.
- 7.2 Tenderers are advised to form their own view on whether TUPE applies, obtaining their own legal advice as necessary.
- 7.3 To assist in future processes the Framework Manager may seek workforce details from present supplier(s). The Framework Manager provides no warranty as to the accuracy of any such information supplied and accepts no liability for any inaccuracies that is contained within it or for any omissions from such information. Tenderers must form their own view and make their own enquiries as to whether TUPE will apply and as to the workforce implications if it does.

This information will be supplied to Tenderers on request on the basis that it is treated as strictly confidential; that it is not disclosed except to such people within the Tenderer's organisation, and to such extent, as is strictly necessary for the preparation of the tender; and that it is not used for any other purpose. By requesting this information from the Framework Manager a Tenderer will be deemed to have agreed to abide by these obligations of confidentiality.

- 7.4 The successful Supplier will be required to indemnify the Contracting Authority against all possible claims under TUPE.
- 7.5 It is a further requirement that the successful Supplier will pass on all details of their own workforce towards the end of the Contract period so that this information can be passed to other bona fide suppliers to enable them to assess their obligations under TUPE in the event of a subsequent transfer occasioned by a future tender process.

*\*Note. TUPE may apply to subsequent Call-Off Contracts but it does not apply to the establishment of this Framework Agreement due to it offering no commitment.*

## **8. Contract Monitoring**

- 8.1 The Framework Manager is committed to helping improve the efficiency of contracted Suppliers through sharing information on performance measurement. The criteria for measuring performance shall be agreed with the Supplier/s and formally documented. It is possible that measurement criteria will develop during the term of the Framework Agreement - this will also be documented following agreement with the Supplier/s.
- 8.2 Monthly contract financial performance monitoring may be necessary to ensure that the correct rebate amount is payable. The Framework Manager reserves the right to request audit data from Participating Authorities to ensure management information is accurate. Failure by a Participating Authority to provide may result in the Framework Manager requesting volume supply information under the auspices of the Freedom of Information Act.

## **9. Canvassing**

9.1 Each organisation forming part of a bid submission must not canvass, solicit or offer any gift or consideration whatsoever as an inducement or reward to any officer (or their partner) or employee (or their partner) of the Framework Manager, or to any officer (or their partner) or employee (or their partner) of any Framework Manager member organisation or to a person (or their partner) acting as an adviser to in connection with the selection of Bidders in relation to this procurement. Without limitation to the generality of the above obligation, any organisation that:

- directly or indirectly attempts to obtain information from any member, employee, agent or contractor of the Framework Manager concerning the process leading to the award of the Framework Agreement or any subsequent Contract (save as expressly provided for in the MOI, SQ or ITT, whichever is applicable); or
- directly or indirectly attempts to contact any member, employee, agent or contractor of the Framework Manager concerning the process leading to the award of the Framework Agreement or any subsequent Contract (save as expressly provided for in the MOI, SQ or ITT, whichever is applicable); or
- directly or indirectly attempts to influence any member, employee, agent or contractor of the Framework Manager concerning the conduct of the process leading to the award of the Framework Agreement or any subsequent Contract, or the structure of the procurement process, or the structure of the contractual opportunity, save where this occurs in a manner provided for in the MOI, SQ or ITT, whichever is applicable;
- directly or indirectly canvasses any member, employee, agent or contractor of the Framework Manager concerning the process leading to the award of the contract (save as expressly provided for in the MOI, SQ or ITT, whichever is applicable);

may be disqualified from the procurement process by the Framework Manager at their absolute discretion. Where any organisation forming part of a bid submission is disqualified the entire bid submission shall be disqualified.

## 10. Collusive Tendering

10.1 Any organisation forming part of a bid submission must neither disclose to, nor discuss with any other potential Bidder, or Bidder (whether directly or indirectly), any aspect of any response to any procurement documents (including the ITT). Without limitation to the generality of the above obligation, any organisation that:

- fixes or adjusts the price included in its response to the ITT by or in accordance with any agreement or arrangement with any other bidder; or
- communicates to any person other than Framework Manager the price or approximate price to be included in its response to the ITT or information that would enable the price or approximate price to be calculated (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the response to the ITT or for the purposes of obtaining insurance or for the purposes of obtaining any necessary security); or
- enters into any agreement or arrangement with any other potential Bidder that has the effect of prohibiting or excluding that potential Bidder from submitting a response to the ITT or as to the price to be included in any response to be submitted; or
- offers or agrees to pay or give or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done any act or

omission in relation to any other response to the ITT or proposed response to the ITT;

may be disqualified from the procurement process by the Framework Manager at their absolute discretion. Where any organisation forming part of a bid submission is disqualified the entire bid submission shall be disqualified.

## 11. Guarantees

- 11.1 If the successful Tenderer is a subsidiary Company within the meaning of S1159 of the Companies Act 2006 (as amended) it shall also provide to the Framework Manager within 28 days receipt of written acceptance of the Tender a Guarantee by its holding Company (as defined by the Companies Act 2006) to secure the due performance by the successful Tenderer of its obligations to the Contracting Authority
- 11.2 If the successful Tenderer shall fail to provide the Guarantee within the period specified in 11.1 above, the Framework Manager shall by written notice to the Tenderer be entitled to treat such failure as putting an end to the Framework Agreement between the Contracting Authority and the Tenderer.

## 12. The Framework Agreement

- 12.1 This procurement exercise concerns the conclusion of a Framework Agreement with two Lots under which a single Supplier will be appointed in each Lot to supply Services to Participating Authorities on the terms agreed. A copy of a specimen Framework Agreement can be found in SCHEDULE B TEMPLATE FRAMEWORK AGREEMENT.
- 12.2 The specification (SCHEDULE A FRAMEWORK AGREEMENT SPECIFICATION) and associated appendices, the terms and conditions at SCHEDULE B TEMPLATE FRAMEWORK AGREEMENT together with any special requirements will form the basis of the resulting Framework Agreement between the successful Bidder and the Contracting Authority. Please confirm your understanding of this statement by completing the "Form of Offer" attached as SCHEDULE F FORM OF OFFER.

## 13. Disclaimer

The information contained in this ITT is presented in good faith and does not purport to be comprehensive or to have been independently verified.

Neither the Framework Manager, or any of its members, nor any of their advisers accept any responsibility or liability in relation to its accuracy or completeness or any other information which has been, or which is subsequently, made available to any Bidder, any relevant organisation, Bidder guarantors, their financiers or any of their advisers, orally or in writing or in whatever media.

Interested parties and their advisers must therefore take their own steps to verify the accuracy of any information that they consider relevant, but are not entitled to rely on any statement or representation made by the Framework Manager, or any of its members or any of their advisers.

Nothing in this ITT is, nor shall be relied upon as, a promise or representation as to any decision by the Framework Manager in relation to this procurement. No person has been authorised by the Framework Manager, or their advisers or consultants to

give any information or make any representation not contained in this ITT and, if given or made, any such information or representation may not be relied upon as having been so authorised.

Nothing in this ITT or any other pre-contractual documentation shall constitute the basis of an express or implied contract that may be concluded in relation to this procurement exercise, nor shall such documentation / information be used in construing any such contract. Each Bidder must rely on the terms and conditions contained in any contract when, and if, finally executed, subject to such limitations and restrictions that may be specified in such contract. No such contract will contain any representation or warranty in respect of this ITT or other pre-contract documentation.

The Framework Manager, accept no liability for any loss, liability, cost or expense (including legal expenses) incurred by any Bidder in preparing for or participating in this ITT process, howsoever arising (whether under contract, tort or under any statutory provision or otherwise) including under any implied contract between the Framework Manager and any Bidder arising by virtue of this ITT process.

In this paragraph, references to the ITT include all information contained in these documents and any other information (whether written, oral or in machine-readable form) or opinions made available by or on behalf of the Framework Manager or any of its advisers or consultants in connection with any other pre-contract documentation.

The Framework Manager reserve the right to change the basis of, or the procedures (including the timetable) relating to, the procurement process, to reject any, or all, of the ITT bids, in respect of the procurement.

The Framework Manager shall not be obliged to appoint any of the Bidders and reserves the right not to proceed with the procurement, or any part thereof, at any time.

## **14. Bidder changes**

Bidders are subject to an ongoing obligation to notify the Framework Manager of any material changes in their identity, financial or other circumstances. This includes, but is not limited to, changes to the identity of partner organisations or sub-contractors or the ownership or financial or other circumstances thereof and solvency of the Bidder. The Framework Manager should be notified of any material change as soon as it becomes apparent.

Failure to notify the Framework Manager of any material changes or to comply with any of these provisions may lead to a Bidder being liable for disqualification from the procurement. The Framework Manager reserves the right to refuse to allow such a change and to disqualify any Bidder from further participation in the procurement process. The Framework Manager may take into account whether such change is material to the delivery of the contract.

## **15. Procurement Costs**

Each Bidder will be responsible for its own costs and expenses (including legal costs and expenses) incurred throughout each stage of the procurement process. The

Framework Manager will not be responsible for any costs incurred by any Bidder or any other person through this process, including but not limited to any exit or de-commissioning costs.

The Framework Manager will not be responsible for any costs and expenses (including legal costs and expenses) that result from delay to this procurement process or from the abandonment of this procurement process.

## 16. **Publicity**

No publicity regarding this procurement process or the award of any Framework Agreement or Contract will be permitted unless and until the Framework Manager has given express written consent to the relevant communication and has approved the detail of any such communication. Without prejudice to the generality of the foregoing, no statements shall be made to the media regarding the nature of any response to this ITT relating to this process, its contents, any ongoing dialogue between the Framework Manager and any Bidder or any proposals relating to it, without the prior written consent of the Framework Manager.

## 17. **IPR**

All procurement documentation issued in connection with this procurement shall remain the property of the Framework Manager and shall be used by the Bidder only for the purposes of this procurement.

## 18. **Law and Jurisdiction**

Any dispute (including non-contractual disputes or claims) relating to this procurement shall be governed by and construed in accordance with the laws of England and Wales.

The courts of England and Wales shall have exclusive jurisdiction to settle any dispute or claim that arises out of or in connection with this procurement (including non-contractual disputes or claims).

## 19. **Prerequisites** (only applicable to the tender if this box is checked, open procedure only and must be referenced in the OJEU notice)

Bids and/or Bidders that fail to meet the minimum standards as denoted in SCHEDULE C PREREQUISITES may be rejected. This includes Bidders that are ineligible to tender under one or more of the mandatory exclusion criteria specified in regulation 57 of the Public Contracts Regulations 2015 (as amended). Bidders that fail to satisfy the Contracting Authority's prerequisites, either economically or technically will be deemed ineligible and not have their bid further assessed.

It is recommended the Bidders review SCHEDULE C PREREQUISITES and satisfy themselves of their own compliance before completing the technical and commercial response schedules.

## 20 **Contingency Plans & Business Continuity**

This clause is for information only. The Contracting Authority requires all of its Suppliers to have contingency and business continuity plans, copies of which will be held on file by the Framework Manager. Where such formal contingency plans are not in place, Suppliers must agree to work with the Framework Manager to produce these over the initial Framework Agreement term to mitigate any risk which may occur and affect contract performance.

Successful Suppliers will be required to provide copies of their contingency plans for any of the following situations:

- 20.1** Fire at your premises
- 20.2** IT failure at your premises
- 20.3** Cyber attack
- 20.4** Industrial action by your staff
- 20.5** National industrial action (e.g. action affecting fuel distribution)
- 20.6** Force majeure (e.g. terrorism, piracy, extreme weather, grounded flights)

## 12. CALL OFF CONTRACT AWARD PROCESS

The following sets out the process by which call off Contracts may be awarded under the Framework Agreement by Participating Authorities.

This procurement exercise concerns the conclusion of a Framework Agreement with two Lots under which a single Supplier will be appointed in each Lot and as such no further competition will be required once awarded. Participating Authorities wishing to call-off from the Framework Agreement may engage directly with the successful Framework Agreement Supplier in the Lot most appropriate to their requirements and finalise their requirements based on local factors. The Framework Agreement will run for a four year term. Call-off Contracts may exceed this period provided that such Contracts are awarded within the Framework Agreement term.

The following outlines a high level process of how parties will engage each other:

1. Successful suppliers canvass potential Client Organisations to generate interest.
2. Interested Client Organisations will be directed to information about this Framework Agreement.
3. Client Organisations can then liaise directly with the Framework Manager to satisfy themselves that the Framework Agreement meets their need.
4. The Framework Manager will issue the Client Organisations with a briefing pack and a copy of the Framework Agreement.
5. The Client Organisations will select the most appropriate Lot under which to award a call-off contract, determined by local factors.
6. The Client Organisations will undertake their own evaluation of the information within the selected Lot of the Framework Agreement, applying the award criteria before subsequently awarding a call-off contract. At this point, the Client Organisation will be referred to as a Participating Authority.
7. The Framework Manager will issue the Participating Authority with a unique reference number which the Participating Authority can use to call-off the services under this Framework Agreement. Participating Authorities attempting to engage the successful Supplier without the unique reference number are doing so outside of the remit of this Framework Agreement and as such the Framework Manager can offer no assurance on legal compliance.
8. The Participating Authority may use the model contract templates as developed within this Framework Agreement.
9. The Framework Manager will monitor expenditure through the successful Supplier's management reports. Management fees as detailed within this ITT will be invoiced based on this information at the rate stated and at the frequency stated.

## 13. LIST OF APPENDICES

SCHEDULE.	Title	Contents	Action
A	Framework Agreement Specification	Specification of the subject matter of the procurement	Applicant should read the specification and ensure they can provide the services listed.
B	Template Framework Agreement (including all Schedules and Appendices)	<ul style="list-style-type: none"> <li>▪ NHS FRAMEWORK AGREEMENT FOR THE SUPPLY OF SERVICES</li> <li>▪ APPENDIX A- CALL OFF TERM AND CONDITIONS FOR THE SUPPLY OF SERVICES</li> </ul>	Read and confirm commitment by submitting a signed unamended copy of SCHEDULE F – FORM OF OFFER
C	Prerequisites	Mandatory/Discretionary and Minimum requirements of all Applicants	Applicants are required to complete all questions in prerequisites in SCHEDULE C PREREQUISITES. Alternatively; Applicants may submit their European Single Procurement Document, which must be completed in full.
D	Technical Schedule	Technical criteria to be assessed within this document	This document once completed should be uploaded as part of tender response to the e-sourcing portal
E	Commercial Schedule	Commercial offerings to be detailed within this document	This document once completed should be uploaded as part of tender response to the e-sourcing portal
F	Form of Offer	Formal Commitment of Applicant to Tender Offer	An unamended copy must be signed by an appropriate person with the authority to commit the Applicant to the Tender offer and the Framework Agreement. This document is in PDF format and should be printed, signed (electronic signatures will not be accepted) witnessed and dated, scanned and attached to the response submission via the e-sourcing portal.
G	Certificate of Non Canvassing		This document once completed should be uploaded as part of tender response to the e-sourcing portal