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which the Buyer and Supplier should agree at the beginning of a Call-Off Contract. The targets and measures listed in the example scorecard (above) are for guidance and should be changed to meet the agreed needs of the Buyer and Supplier.

The recommended process for using the Balanced Scorecard is as follows:

1. The Buyer and Supplier agree a templated Balanced Scorecard together with a performance management plan, which clearly outlines the responsibilities and actions that will be taken if agreed performance levels are not achieved.
2. On an pre-agreed schedule (e.g. monthly), both the Buyer and the Supplier provide a rating on the Supplier's performance
3. Following the initial rating, both Parties meet to review the scores and agree an overall final score for each Key Performance Indicator
4. Following agreement of final scores, the process is repeated as per the agreed schedule

CCS encourages Buyers to share final scores with CCS, so that performance of the Framework Agreement can be monitored. This may be done by emailing scores to: [cloud\\_digital@crowncommercial.gov.uk](mailto:cloud_digital@crowncommercial.gov.uk).

## **Schedule 6 - Optional Buyer terms and conditions**

### **Sch 6.1 — Buyer's agent**

~~The Buyer (as principal) has authorised [NAME OF AGENT] to act as agent on their behalf. The Buyer (as principal) remains liable for all of the Buyer obligations under this Call-Off Contract entered into on its behalf by its agent.~~

## **Schedule 7 - How Services will be bought (Further Competition process)**

### **Sch 7.1 — Who is responsible for awarding a Call-Off Contract**

~~All Buyers listed under the OJEU Contract Notice may award a Call-Off Contract under this Framework Agreement.~~

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The Buyer may appoint an agent to act on their behalf.

CCS is not responsible for the actions of any Buyer.

### **Sch 7.2 — Activity that may take place before Further Competition**

Before starting a Further Competition, a Buyer will regularly undertake market engagement and publish a draft requirements document for Suppliers. Those Suppliers may then give feedback in order to:

- help the Buyer understand the complexity of the work; and
- help improve the quality of the brief that will be issued pursuant the Further Competition.

### **Sch 7.3 — Buyer reserves the right not to award**

A Further Competition procedure may be cancelled at any time and the Buyer is not obliged to award a Call-Off Contract.

At any stage during the Further Competition, the Buyer may go back to any stage in the further competition process and amend their requirements if they consider that the further competition is not meeting their needs.

Suppliers may ask clarification questions relating to the Buyer's requirements. The Buyer will specify how clarification questions can be asked and when the clarification period will close through the Digital Marketplace. Questions and responses will be anonymised and made available to all Suppliers.

### **Sch 7.4 — Right to change Further Competition process**

CCS may change the Further Competition process and the tools used for evaluation at any time.

### **Sch 7.5 — Lot 1: Digital outcomes Further Competition and Evaluation process**

In order to complete the following Further Competition process, the Buyer will:

- a) Write a brief detailing their requirements and the outcome they want to achieve.

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b) ~~Indicate their evaluation method and criteria for assessing Suppliers against the brief, together with a timetable for the evaluation process. The timetable will consider the complexity of both the brief and the evaluation method being used and will allow enough time for Suppliers to respond. It will include:~~

- ~~• the bid submission due date; and~~
- ~~• the date range for any subsequent evaluation stages.~~

c) ~~Produce a list of all capable Suppliers that meet their requirements. This may be generated using information provided by Suppliers in their Framework Agreement Applications.~~

d) ~~Publish the brief and the evaluation process to the list of capable Suppliers~~

e) ~~Request a response from interested Suppliers which must include answers to a number of yes/no questions defined by the Buyer. The Buyer will indicate against each question whether a positive response is essential or desired. A Supplier must provide a positive response to all essential questions to in order to proceed to the next stage.~~

f) ~~Review the list of interested Suppliers who both submitted a response and meet all essential criteria.~~

g) ~~(Optional) Create a shortlist by asking all Suppliers who meet the essential criteria further yes/no questions. This step may be repeated if necessary.~~

h) ~~(Optional) Create a shortlist by asking all Suppliers who meet the essential criteria any qualitative questions relating to the brief.~~

i) ~~Invite shortlisted Suppliers to a further evaluation. This may include any of the evaluation methods indicated when the brief was issued. Evaluation methods may include but are not limited to:~~

- ~~• providing a written proposal~~
- ~~• providing a case study or evidence of previous work~~
- ~~• a presentation~~
- ~~• a pitch~~
- ~~• an interview~~
- ~~• providing a reference.~~

- j) Evaluate Suppliers using the evaluation criteria indicated when issuing the brief.
- k) Run financial due diligence if required on the provisionally successful Supplier(s).
- l) Award a Call-Off Contract to the successful Supplier(s).
- m) Notify unsuccessful Suppliers and provide the shortlisted Suppliers with feedback.

The Buyer reserves the right to use some, but not all, of the evaluation methods indicated when issuing the brief.

The Buyer will evaluate Suppliers' responses against the following criteria:

| Criteria                           | Weighting range (%) |
|------------------------------------|---------------------|
| Technical merit and functional fit | 10 – 75             |
| Cultural fit                       | 5 – 20              |
| Price                              | 20 – 85             |
| <b>TOTAL</b>                       | <b>100%</b>         |

Weightings for technical merit and functional fit, cultural fit and price will be set by the Buyer within the above ranges. Weightings must add up to 100%.

If 2 or more Suppliers have the same score, the Buyer will use either:

- the score from the criteria with the highest weighting, then the next highest weighting until the tie is broken; or
- require the tied Suppliers to provide best and final offers.

**Sch 7.6 — Lot 2: Digital specialists Further Competition and Evaluation process**

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In order to complete the following Further Competition process the Buyer will:

- a) Write a brief detailing their requirements and the Deliverables they need.
- b) Indicate their evaluation method and criteria for assessing Suppliers against the brief together with a timetable for the evaluation process. The timetable will take into account factors such as the complexity of the subject matter of the proposed Call-Off Contract and the time needed to submit bids. It will include:
  - the bid submission due date; and
  - the date range for any subsequent evaluation stages.
- c) Produce a list of capable Suppliers that meet their requirements. This may be generated using information provided by Suppliers in their Framework Agreement Applications.
- d) Send the brief and the evaluation process to the list of capable Suppliers.
- e) Request a response from interested Suppliers which must include answers to a number of yes/no questions defined by the Buyer. The Buyer will indicate against each question whether a positive response is essential or desired. A Supplier must provide a positive response to all essential questions to proceed to the next stage.
- f) Review the list of interested Suppliers who submitted a response and meet all essential criteria.
- g) (Optional) Create a shortlist of all Suppliers who meet essential criteria by asking further yes/no questions. This step may be repeated if necessary.
- h) (Optional) If sufficient information is available to evaluate or the number of responses is manageable, go straight to evaluating Suppliers (point j).
- i) Invite shortlisted Suppliers to further evaluation to assess whether their proposed specialist is able to meet their requirements. This may include any or all of the evaluation methods indicated when the brief was issued. Evaluation methods may include but are not limited to:
  - providing a profile
  - providing a written proposal
  - providing a case study or evidence of previous work

- a presentation
- an interview
- a test
- providing a reference.

- j) Evaluate Suppliers using the evaluation criteria indicated when issuing the brief.
- k) Run financial due diligence if required on the provisionally successful Supplier(s).
- l) Award a Call-Off Contract to the successful Supplier(s).
- m) Notify unsuccessful Suppliers and provide the shortlisted Suppliers with feedback.

The Buyer reserves the right to use some but not all of the evaluation methods indicated when issuing the brief.

The Buyer will evaluate Suppliers' responses against the following criteria:

| Criteria                           | Weighting range (%) |
|------------------------------------|---------------------|
| Technical merit and functional fit | 10 – 75             |
| Cultural fit                       | 5 – 20              |
| Price                              | 20 – 85             |
| <b>TOTAL</b>                       | <b>100%</b>         |

Weightings for technical merit and functional fit, cultural fit and price will be set by the Buyer within the above ranges. Weightings must add up to 100%.

If 2 or more Suppliers have the same score, the Buyer will use either:

- the score from the criteria with the highest weighting, then the next highest weighting until the tie is broken; or

- require the tied Suppliers to provide best and final offers.

**Sch 7.7 — Lot 3: User research studios Further Competition and Evaluation process**

In order to complete the following Further Competition process the Buyer will:

- a) Write a brief detailing their requirements, eg facilities needed, studio location and availability.
- b) Indicate their evaluation method and criteria for assessing Suppliers against the brief.
- c) Produce a list of capable Suppliers based on the Buyer's requirements. This may be generated using information provided by Suppliers in their Framework Agreement Applications.
- d) Contact the list of capable Suppliers to find out whether they are able to meet the requirements.
- e) Evaluate Suppliers using the evaluation criteria indicated when issuing the brief.
- f) Run financial due diligence if required on the provisionally successful Supplier(s).
- g) Award a Call-Off Contract to the successful Supplier(s).
- h) Notify unsuccessful Suppliers and provide the shortlisted Suppliers with feedback.

The Buyer will evaluate Suppliers' responses against the following criteria:

| Criteria                           | Weighting range (%) |
|------------------------------------|---------------------|
| Technical merit and functional fit | 15 – 75             |
| Price                              | 25 – 85             |

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|              |             |
|--------------|-------------|
| <b>TOTAL</b> | <b>100%</b> |
|--------------|-------------|

The Buyer may inspect the Supplier's studios before Call-Off Contract award or before they are used.

If 2 or more Suppliers have the same score, the Buyer will use either:

- the score from the criteria with the highest weighting, then the next highest weighting until the tie is broken; or
- require the tied Suppliers to provide best and final offers.

**Sch 7.8 — Lot 4: User research participants Further Competition and Evaluation process**

In order to complete the following Further Competition process the Buyer will:

- a) Write a brief detailing their requirements.
- b) Indicate their evaluation method and criteria for assessing Suppliers against the brief together with a timetable for the evaluation process. The timetable will consider the complexity of both the brief and the evaluation method being used and will allow enough time for Suppliers to respond. It will include:
  - the bid submission due date; and
  - the date range for any subsequent evaluation stages.
- c) Produce a list of capable Suppliers that meet the Buyer's requirements. This may be generated using information provided by Suppliers in their Framework Agreement Applications.
- d) Send the brief and evaluation process to the list of capable Suppliers.
- e) Request a response from interested Suppliers which must include answers to a number of yes/no questions defined by the Buyer. The Buyer will indicate against each question whether a positive response is essential or desired. A Supplier must give a positive response to all essential questions to proceed to the next stage.
- f) Review the list of interested Suppliers who submitted a response and who meet all essential criteria.

~~g) (Optional) Create a shortlist of all Suppliers who meet essential criteria by asking further yes/no questions. This step may be repeated if necessary.~~

~~h) (Optional) If sufficient information is available to evaluate or the number of responses is manageable, go straight to evaluating Suppliers (point j).~~

~~i) Invite shortlisted Suppliers to a further evaluation stage. Only evaluation methods indicated when issuing the brief can be used. These methods may include but are not limited to:~~

- ~~• providing a written proposal~~
- ~~• providing a case study or evidence of previous work~~
- ~~• providing a reference~~
- ~~• an interview~~

~~j) Evaluate Suppliers using the evaluation criteria indicated when issuing the brief.~~

~~k) Run financial due diligence if required on the provisionally successful Supplier(s).~~

~~l) Award a Call-Off Contract to the successful Supplier(s).~~

~~m) Notify unsuccessful Suppliers and provide shortlisted Suppliers with feedback.~~

~~The Buyer reserves the right to use some but not all of the evaluation methods indicated when issuing the brief.~~

~~The Buyer will evaluate Suppliers' responses against the following criteria:~~

| <b>Criteria</b>                    | <b>Weighting range (%)</b> |
|------------------------------------|----------------------------|
| Technical merit and functional fit | 10 – 80                    |
| Availability                       | 10 – 80                    |
| Price                              | 20 – 80                    |