**Framework Schedule 1 (Specification)**

**RM6181 Contact Centres and Business Services**

This Schedule sets out what we and our Buyers want. Suppliers shall be required to deliver the Deliverables to the Buyer under the Call-Off Contract for the Lot(s) they have been appointed to.

For all Deliverables, the Supplier must help Buyers comply with any specific applicable Standards to the Buyer.

The Deliverables and any Standards set out in Framework Schedule 1below may be refined (to the extent permitted and set out in the Order Form) by a Buyer during a Direct Award or Further Competition Procedure to reflect its Deliverables requirements for entering a Call-Off Contract.

##

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1. **Summary**

**The Deliverables covered by this framework are divided into two Lots**

|  |  |
| --- | --- |
| **Lot 1**  | **Lot 2** |
| **Contact Centres**  | **Business Services**  |

1. **Lot 1 Contact Centres - Scope of Deliverables**
	1. The scope of Lot 1 is for the provision of contact centre services which will include, but is not limited to:
2. Service delivery
3. People (can be provided with or without technology)
4. Transformational Consultancy
5. Facilities (and/or home working capability)
6. Technology (can only be provided with people services)

Suppliers shall be able to provide the full suite of requirements, or any mix of a - e thereof, excluding d - e which cannot be sourced in isolation under this Framework Contract.

1. **Mandatory Requirements**

Suppliers awarded a place on this framework shall comply with the following mandatory requirements:

* 1. Suppliers shall provide flexible and scalable fully outsourced contact centre services, in line with the ongoing demands of the Buyer.
	2. Suppliers shall take either an Existing Service (managed by either the Buyer or an Incumbent Supplier) or New Service and offer both operational and commercial solutions, including, but not limited to, technology implementation, process improvement and continuous improvement initiatives throughout the lifecycle of the Contract to support Buyer preferences to drive commercial efficiencies.
	3. Suppliers shall have the ability to deliver the following service delivery types;
1. Priority services: health, pandemic and emergency services (blue light) critical Contracts that can be 24/7/365, volumes often variable, availability and speed of response is a prerequisite.
2. Critical services; complex Contracts, often high volume and high degree of training required for longer AHT engagement with high public scrutiny such as benefits services, community services and finance/debt advice.
3. Support and contingency services; delivering or supplementing a Buyer programme, delivering a Citizen Experience Centre with help, advice, campaigns, careers, recruitment.
4. Business as usual citizen and industry services; delivery of services related to existing or new public sector processes which are not to be delivered on a temporary basis.
5. Project based services; delivery of short-term or temporary services, often to cover volume surge, with a defined outcome and timeline for delivery.
	1. Subcontracting

Use of Subcontractors is fully permissible but these shall be notified to the Buyer as part of any proposal. The Supplier retains overall responsibility for the delivery of all deliverables under the Framework Contract. Unless otherwise explicitly agreed by the Buyer, all subcontractors shall be onshore.

The Supplier shall proactively encourage SMEs to become part of their supply chain to support the Government’s SME agenda.

* 1. Partnership

Where requested by the Buyer, the Supplier shall work in a partnership model collaboratively with other Framework Contract suppliers to deliver on the Buyer’s strategy.

* 1. Localisation

The Supplier shall optimise performance and service delivery, and ensure that services are delivered nationally with the capacity to provide local and regional services, supporting a localisation agenda. The key regions are defined as: North East, North West, Yorkshire and the Humber, West Midlands, East Midlands, East Anglia, South West, South East, Greater London & the devolved areas.

* 1. The following services are **out of scope** of this Lot;
* Citizen and industry facing IT help and service desks. Environments designed to provide 1st, 2nd and 3rd level technical support to hardware and software users;
* Technology only deployments of services;
* Facility only deployments of services;
* Standalone switchboard services that are not wrapped around a wider contact centre service; and
* Back office routines, which are unrelated to a Buyer’s service delivery process.
1. **Mandatory Deliverables**

Suppliers awarded a place on this framework must comply with the following mandatory Deliverables:

* 1. **Service Delivery**
		1. The Supplier shall have a minimum on-shore delivery capacity of 150 seats.
		2. The Supplier shall have the capability to provide a scalable service, including delivery centres and seat numbers, in the UK (including Northern Ireland) as requested by the Buyer.
		3. The Supplier shall be aware that, unless otherwise specified by the Buyer in the Call-Off Contract, Contract volumes are not guaranteed and variations to Contract delivery will occur in day; in week; in month; in year and with seasonal peaks.
		4. The supplier shall provide all services relating to service delivery, including but not limited to:
1. Workflow processes and management: The Supplier shall deliver workflow processes where required by the Buyer. These may be provided directly by the Supplier or a Third-Party Subcontractor and include, but are not limited to:
* Printing including specialist print;
* Payment processing;
* Mail drops;
* Application processing;
* Back Office Processing
* Document creation and development;
* Outbound marketing; and
* Other fulfilment services
1. Implementation and transition: The Supplier shall lead implementation and transition activities from the point of Contract Award, including project management during mobilisation. The Supplier shall project manage the implementation in accordance with recognised project management principles. The Supplier shall deliver, as a minimum:
* a detailed task level plan;
* an exit and transition plan;
* experienced implementation resources and processes;
* a governance framework;
* identification of Buyer’s dependencies;
* maintenance of a joint risks and issues log between the Supplier and the Buyer;
* data management and transfer; and
* management of any TUPE related activity
1. Service/account management and reporting: The Supplier shall, where applicable to individual service requirements and scope, deliver the following activities including but not limited to:
* Assurance activity;
* Complaints procedures & complaints handling;
* Analytics and Insights;
* Freedom of Information requirements;
* Subject Access Requests;
* Fraud/suspicious activity prevention and reporting;
* Auditing check and assessments;
* Change Request management and implementation;
* Contract Management;
* Training;
* Incident reporting and resolution;
* Resolution planning; and
* Issue identification, root cause analysis, escalation and remediation.

The Supplier shall meet these requirements whether the services are based on site or via a home-working delivery model.

1. Operating hours: The Supplier shall have the capability to provide the services 24 hours a day, 365 days a year. The actual hours shall be defined by the Buyer at Call-Off.
2. Capacity management: Suppliers shall, where required by the Buyer:
* proactively make recommendations from their technical and market knowledge to accurately inform forecast capacity requirements;
* make recommendations and work with the Buyer to manage the resource and cost implications anticipated as a result of citizen or industry contact activity; and
* fulfil the volumes required by the Buyer and manage fluctuations in volumes.
1. Optimisation and blending of services: The Supplier shall continually review the service delivered to ensure they are providing the optimal Service to meet the Buyer’s requirement.

This may include the process of optimising and blending resources across a Supplier’s Call-Off Contracts, where prior permission has been agreed by the Buyers.

1. Back office: The Supplier shall provide back office services where required by the Buyer in the Call-Off Contract. Back office services may include, but are not limited to:
* Record creation;
* Data administration;
* Ad Hoc or regular reporting (outside of contact centre performance reporting);
* Receiving and making payments;
* Vetting;
* Application approvals;
* Copying; and
* Printing and posting of contact generated literature.
1. User experience: The Supplier shall deliver user experience improvement activities that may include but are not limited to:
	* User training and end user guidance;
	* Continual user satisfaction surveys and standard measures;
	* Responsibility for user facing systems, either as ‘skins’ over existing technology infrastructure or their own/subcontracted stand-alone integrated systems;
	* Usability tests and assessments;
	* Mobile and response services to employees;
	* Development teams, consisting of, user researchers, content designers and front-end developers;
	* Complaints monitoring;
	* Trend monitoring including common issues, time to answer;
	* Call listening/monitoring for quality purposes; and
	* Continuous Improvement plan
2. Policy, governance and legislation: this may include but is not limited to:
* Policy audit and compliance;
* Managing and implementing policy changes and updates;
* Embedding changes into technology systems; and
* Adherence to legislation and implementations and adoption of subsequent changes
1. Innovation: The Supplier shall develop, present and lead on innovation activities during the lifecycle of the Framework Contract and any Call-Off Contracts.
2. Exit and transition: In addition to the requirements set out in Call-Off Schedule 10, the Supplier shall lead on a lesson learnt workshop prior to the end of any Call-Off Contracts as requested by CCS or the Buyer.
	1. **People**
		1. When required by the Buyer, the Supplier shall manage the recruitment, management and development of all appropriately skilled staff required for the delivery of services including suitable agents, project, management, quality assurance, training and administrative teams.
		2. The supplier shall provide all services relating to people, including but not limited to:
3. Flexible Staffing: The Supplier shall provide a flexible staffing structure, which will provide full continuity of the services to the agreed service level agreements, as specified by the Buyer in the Call-Off Contract. In the event that actual volumes are subsequently higher or lower than forecasted by the Supplier or the Buyer, the Supplier shall, subject to agreement with the Buyer, adjust the structure so that it can optimise staffing levels against actual volume and provide real time scheduling.
4. Languages: In addition to English, the Supplier shall, where required by the Buyer, deliver the services in western European, eastern European, Asian and Arabic languages including, but not limited to:
* Welsh (Welsh Language Standards regulations);
* Gujarati;
* Hindi;
* Urdu;
* Punjabi;
* Romanian;
* Russian;
* Mandarin;
* Spanish;
* French;
* Polish;
* Czech;
* Slovak;
* Arabic;
* Cantonese; and
* Algerian.
1. Account and Operational management roles: The Supplier shall deliver the appropriate account and operational management to ensure service delivery. A list of expected roles and definitions can be found at Annex B of this Framework Schedule 1 - Specification.
2. Security Vetting: The Supplier shall ensure that all Supplier personnel including any temporary staff, are security cleared to an adequate level correspondent to the Buyer’s requirement. This may include but is not limited to; Security Clearance (SC), DBS check or security vetting to Baseline Personnel Security Standard (BPSS). The Supplier shall provide security assurance and vetting as per a schedule agreed with the Buyer.

1. Qualifications and vetting: The Supplier shall ensure that all Supplier personnel meet vetting requirements as required by the Buyer and possess the qualifications, experience and competence appropriate to the tasks for which they are employed.
2. Training: Suppliers shall ensure their personnel are adequately trained and developed as per 4.2.1. Similarly, the Supplier shall work collaboratively with the Buyer to ensure personnel are trained and developed to the level required by the Buyer in relation to service delivery, activities may include but are not limited to;
* Training in relation to technology provided;
* Training in relation to emotional intelligence and customer service skills; and
* Development and maintenance of training material.
1. Should temporary staff be used to deliver any part of the Services, the Supplier shall be aware of, and ensure compliance with, all changes in practice in the recruitment market and changes in policy and legislation, including but not limited to the Agency Workers Regulations: <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/32121/11-949-agency-workers-regulations-guidance.pdf>.
2. The Supplier shall ensure compliance with the National Minimum Wage (NMW) and National Living Wage (NLW) legislation as required by the Contracting Authority in relation to payment of personnel when delivering any part of the Services. Buyers may require payment of personnel above those stipulated within NMW and NLW legislation: <https://www.gov.uk/national-minimum-wage-rates>.
	1. **Facilities**
		1. The Supplier shall provide a flexible approach to secure accommodation or home-working facilities that meets all legislative requirements and the requirements of each Buyer, as defined by the Buyer in the Call-Off Contract. This will include the ability to scale up or down, in line with Buyers’ forecasts, activity levels and the security requirements.
		2. The supplier shall provide all services relating to service People, including but not limited to:
3. Locations: The Supplier shall enable the delivery of services from within the United Kingdom & Northern Ireland, at the following locations;
* Homeworking - non-site based agents;
* Insourced - agents supplied at Buyer’s choice of location; and
* Outsourced - agents supplied at the Supplier’s operational location.
	+ 1. All service delivery locations shall be agreed in advance by the Buyer
	1. **Technology**
		1. The Supplier shall, where required by the Buyer, provide all technology elements as required to deliver the services specified by the Buyer in the Call-Off Contract, including, IT and omni-channel solutions that can react to the Buyer’s demand, while meeting the Buyer’s security and data protocols.
		2. The Supplier shall keep fully up to date on all relevant technology developments and propose new technology solutions and implement as required by the Buyer.
		3. The Supplier shall ensure that all technology provided via the Framework Contract is developed, implemented and maintained in accordance with the Buyers’, HM Government and NCSC security standards, unless otherwise specified by the Buyer in the Call-Off contract.
		4. The Supplier shall be responsible for the management of updates, patches and release for technology used in the delivery of the services. It is expected that the Supplier will provide notice to the Buyer of any activity associated with this.
		5. The Supplier shall be responsible for the technology integration activity, working with the Buyer, and/or Incumbent Supplier, as necessary to meet mobilisation deadlines.
		6. The supplier shall provide all services relating to service Technology, including but not limited to:
1. Omni channel technology and services: If required by the Buyer, the Supplier shall deliver activities including, but not limited to;
* Email;
* Social media;
* Telephony supporting inbound and outbound calls;
* Webchat/chatbot;
* Instant messaging;
* Multi language;
* White mail;
* Web self-service;
* Interactive voice response (IVR);
* SMS;
* Processes supported by Robotic Process Automation (RPA);
* Process to Pay (P2P);
* Processes supported by AI; and
* Helpdesk support for contact centre agents.
1. Software: The Supplier shall have the capability to deliver, but not limited to;
* Customer Relationship Management;
* Workforce management;
* Integrated voice/call recording and storing;
* Voice & Screen Scrape Analytics
* Analytics/data visualisation tools;
* Management Information system;
* Identification and verification system;
* Knowledge management systems;
* Omnichannel Communication System;
* Security software; and
* Homeworking technology.
1. Data Management Services: The Supplier shall have the capability to deliver data management services which include but are not limited to:
* Database management;
* Capacity management;
* Data migration support;
* Data warehouse management; and
* Architecture support.
1. Hardware: The Supplier shall be responsible for providing the hardware required to support the delivery of the services unless, otherwise specified by the Buyer. Including but not limited to, dedicated telephony and IT hosting architecture and infrastructure.
2. Management of the wider technology ecosystem: The Supplier shall be responsible for managing the wider technology ecosystem, activities may include but are not limited to;
* Support the integration of digital assistants;
* Enable machine learning technologies;
* Manage and provide Reachback solutions for legacy systems;
* Support Application Programming Interface (API) functionality;
* Recommend and propose new technologies;
* Development of supporting systems; and
* Ability to onboard and manage legacy systems.
1. CRM and ERP Management: The Supplier shall be responsible for adopting the Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) platforms on behalf of the Buyer.
2. Supplementary technology for integration: Where required by the Buyer, the supplier shall be required to provide supplementary technology for integration activity, including but not limited to:
* AI; and
* Back Office Processing.

* 1. **Transformational Consultancy**
		1. The Supplier shall provide Continuous Improvement activities in relation to contact centre operations and user experience throughout the Contract Period to deliver transformational services. This shall include, but is not limited to:
* Assessment of and recommendation of delivery options
* Design and build of new projects; and
* Delivery of implementation services.

Services shall include project management activity as required.

* + 1. The supplier shall provide the following services as required by the Buyer, including but not limited to:
1. Option development and recommendation: Provision of review, analysis and recommendations for existing/new contact centres for the Buyer, including but not limited to locations, process, resourcing, technology options, cost modelling and make/buy analysis.
2. Customer Journey: Creation, development, optimisation and mapping of customer journeys and processes for the Buyer, including introduction of interventions and exception planning.
3. Process Developments: Creation, development, optimisation and mapping of the Buyer’s processes, including process maps, agents’ scripts and FAQ’s.
4. Cost Optimisation: Review and provide recommendations on opportunities for cost optimisation.
5. Resource Management: Review and provide recommendations in relation to resource management at contact centres to the Buyer, including skills, experience, training requirements, recruitment strategies and talent mapping.
6. Project and change management: Develop and deliver project and change management activity and strategies in relation to contact centres to the Buyer. Project management shall follow a formal project management methodology where the scope of the project requires it.
7. Customer interaction channel strategies: Reviewing and advising on channels including telephony, text, webchat and social media.
8. Consultative support: Provide consultative advice and recommendations to the Buyer on innovation or transformational change in relation to contact centres and back office functions.
9. Technology: Reviewing and advising on the current and future technology including, but not limited to;
* CRM tools;
* speech recognition software;
* interactive voice response;
* AI; and
* data analytics tools.
1. Performance management: Reviewing and advising on the Buyer’s KPIs, SLAs and reporting.
2. Organisational planning: Reviewing and advising on workforce optimisation, operating hours, handling times, capacity management and forecasting.
3. **Optional Deliverables**
	1. **Value Added Service Requirements**
		1. Suppliers are expected to provide, as a minimum, the following value-added services at no additional charge to any Buyer, these may include but are not limited to:
4. Deployment of Webchat/or other non-voice channels;
5. Provision of Voice Analytics;
6. Provision of RPA tools;
7. CSAT/NPS auto survey;
8. Customer Experience Strategy Consulting;
9. Digital Strategy Consulting and Enablement;
10. Knowledge Management Database creation;
11. App Deployment and Messaging;
12. Learning & Development Analysis, Consultation and Overhaul inclusive of Digitisation;
13. Customer Journey Mapping and Overhaul;
14. AI deployment;
15. Social Media Monitoring and Tools;
16. Email Translation Services; and
17. Language Translation Services.
	* 1. Where the Supplier is able to, the Supplier Shall, over the course of any Call-Off Contract, proactively offer any further additional services outside of this list where appropriate, at no additional charge to the Buyer.
18. **Lot 2 Business Services - Scope of Deliverables**
	1. The provision of Business Services, to include transactional processing and associated services on Enterprise Resource Planning (ERP) platforms.
	2. It is the intention for Central Government Buyers to use this Framework collectively (multiple government departments procuring together and through one Call-Off).
	3. The Deliverables in scope for Lot 2 are:

**Mandatory Requirements**

* Global Design Principles
* User Centric
* Performance and Quality Data
* Interoperability
* Transitional Service and Continuous Improvement
* Transparency KPIs
* Reporting
* User Experience
* Change Management
* Data

**Mandatory Deliverables**

* Business Processing
* Payroll
* HR
* Source to Pay
* Financial Accounting

**Optional Services**

* Customer Guidance tool
* Legacy Services
* Business Intelligence and Reporting
* Information Technology Outsourcing (ITO) Services
* Application Management Services (AMS)
* Technical Support
* Additional IT Services
* Security Operation Centre (SOC) and Network Operation Centre (NOC) Services
* ERP Support/Maintenance
* Extensions/Modifications
* Value Added Service Requirements
1. **Lot 2 Business Services - Mandatory Requirements**

Suppliers awarded a place on this framework shall comply with the following mandatory requirements:

* 1. It is anticipated that ERP platforms will be provided by the Central Government Buyers (although Buyers may wish to procure their ERP platform through this framework)
* Suppliers shall support the Buyers ERP platforms. In some instances, the Supplier may need to be (or engage with) a certified partner of the technology platform.
* Suppliers will need to drive effective and efficient use of the ERP functionality by maximising self-service and automation to improve processing times, reduce errors and manual intervention. The user experience and integration are priorities and need to be simple, accessible and flexible. This will continue to evolve as new functionality becomes available. Demonstrable continuous improvement of the service is required.
* Where functionality is known at contract award date, the Supplier shall adopt a “digital first” (self -service where available and minimising manual interaction) approach, or an agreement of phases will be made with the Buyer, to ensure maximum functionality is utilised over a period of time.
* Suppliers shall help enable adoption of Commercial Off- the-shelf (COTS) products, support seamless integration and avoid customisation and the development of complex solutions.

* 1. **Global Design Principles**

Suppliers are required to support the adoption of the Global Design Principles for HR and Finance, and identify and support delivery of process improvement to ensure alignment with them. These may be updated from time to time and Suppliers shall keep up to date with any changes:

<https://www.gov.uk/government/publications/finance-global-design->principles

[https://www.gov.uk/government/publications/global-hr-design](https://www.gov.uk/government/publications/global-hr-design%20)

* 1. **User Centric**
* Suppliers shall put users at the forefront of their approach to Business Services to enable an improved internal and external user experience.
* In delivering their Business Processes, where required, Suppliers shall support Buyers to help them reshape the business model, be user experience centric to meet the demands of the digital age and capability centred to drive mutually agreed business outcomes.
* Basic advice needs to be easily accessible via this service, clear sign-posting will help direct the user to the correct information. Suppliers shall fully utilise technology, deliver a multi-channel approach for users to communicate with the service, depending on their preferences and the nature of their query.

* 1. **Performance and Quality Data**
* Suppliers will be required to enable full transparency of performance data, and access to transactional level data for all procured services, either within a suitable business intelligence tool or through the ERP solution (which may be procured through this framework) in line with an agreed frequency with the Buyer.
* Suppliers shall use, provide and act on quantitative and qualitative feedback from performance data to provide continuous improvement to the solution for the Buyer and its users.
* Suppliers shall provide full access to all system and transactional data, user access logs and key documentation sets for audit purposes.
	1. **Interoperability**

Suppliers shall enable Application Programming Interface (API) integration with Additional IT Services (see section 9.7) and other systems as required by the Buyer (Refer to Annex A - GSS Enterprise Architecture diagram - Central Systems and Supporting Systems). Suppliers will be granted permission to develop and support APIs, but where Customers have funded the development of the APIs, the Customer will retain the Intellectual Property Rights (IPR).

* 1. **Transitional Service and Continuous Improvement**

The Supplier shall optimise the usage of the ERP platform(which will either be provided by the Customer or procured through this framework). The Supplier will use the latest technologies to support the most efficient service provision and demonstrate value for money across all processes outlined in this specification document. The Supplier will need to work flexibly and to the latest release of the ERP throughout the duration of the Buyers Call-Off. This may result in services reducing or changing over time as more functionality becomes available and processes can be automated.

A Buyer may require an incremental phased approach, to be agreed at individual Call-Off level, where the level of automation increases over an agreed timescale and demonstrably reduces the amount of manual intervention. This shall include a requirement for the Supplier to conduct a gap analysis of the current and target service and develop a plan to fill the gaps.

Continuous improvement activities will be demonstrated by the Supplier on an agreed frequency via an agreed governance process and shall address the Buyers Requirements, including but not limited to:

1. improving the Buyer user experience of user journeys/processes;
2. cross-government improvement initiatives;
3. measures to improve performance; and
4. drive greater convergence and standardisation across government.
	1. **Transparency KPIs**

For Central Government Buyers, The Supplier shall provide performance data for the government transparency reporting agenda. The 3 Key Performance Indicators (KPIs) relating to the mandatory objectives of Lot 2 are:

* payroll accuracy;
* payment and invoicing accuracy; and
* end user satisfaction through Net Promoter Score.

These KPIs and their performance will be published into the public domain. The KPIs and requirements may change over time.

* 1. **Reporting**
		1. The Supplier shall be required to report on the performance and delivery of the contract. The service reports shall include for each Call-Off but are not limited to:
* Summary of charges, credits and forecast;
* Detailed periodic performance against Standard Service Levels (SSLs) and Key Performance Indicators (KPIs);
* Customer insight (including complaints);
* Availability, utilisation and use of systems;
* Performance of support services such as Contact Centres;
* Sub-Contractor performance or performance against any Operating Level;
* Agreements (OLAs);
* Reporting on contract change and work orders, including of their delivery; and
* Continuous improvement.

As part of the Buyers contract management processes the Supplier shall be required to provide a detailed specification for all the performance measures with the following information:

* source origin for transaction data;
* calculations, filtering, and/or manipulation the Supplier undertakes to calculate;
* performance against a measure;
* Quality or Assurance Control points (manual or automated);
* supplier report titles and descriptions; and
* mapping of underlying report and/or data structure for each measure.

* 1. **User Experience**

User experience expectations require that the Supplier shall:

* Drive User Adoption through blended, modern and fully accessible training methods for new or optimised features;
* Capture user satisfaction through various methods including, but not limited to, continual user satisfaction surveys through net promoter score;
* Provide a dedicated customer service team to support the initial embedding of the system;
* Ensure contact reasons are categorised by task and platform so high-volume issues can be analysed and the experience optimised; and
* For Central Government Buyers, the user experience shall be built to Government Digital Service (GDS) standards, such as the GDS Service Manual and Style Guide;
* When working with the Buyer on new processes or optimising existing interfaces;

○ Ensure the end user needs have been clearly understood;

○ Have a cross functional team consisting of user experience practitioners;

○ Ensure new processes integrate intuitively into the platform through user testing;

○ Conduct usability & accessibility tests and iterate findings;

* For Central Government Buyers, be responsible for ensuring user facing systems work seamlessly for users and comply with GDS Standards;
* Identify processes and tasks which can be automated (and have an understanding of potential blockers to such automation);
* Ensure that Solutions are smart device friendly;
* Supplier shall ensure that Solutions have a plan for self-service voice interaction; and
* Demonstrate that their Solution is compliant with the latest WCAG principles (level AA as a minimum) and GDS best practice to meet accessibility needs, including the use of Assistive Technologies in use by the Buyer.
	1. **Change Management**

The Supplier shall be required to create and manage a complete change control process ensuring the changes to processes and services are effectively managed, including:

* Clearly documented change control process (including streamlined process for work orders in addition to formal change process);
* Service levels for changes;
* Change process that manages both Buyer proposed changes and changes proposed by the Supplier to improve processes and services;
* Proactively manage BPS process changes required due to any changes in ERP;
* Timely and effective communication to Buyers; and
* The change process shall explain how process improvements and efficiencies will be reflected in reductions in the service cost.
	1. **Data**

In relation to data Suppliers shall:

* Have the ability to receive an extract from the Buyers previous ERP, and load it into the Buyers current or new ERP
* Where requested by the Buyer, the Supplier shall provide Legacy Services (see section 9.2)
* Where requested by the Buyer, the Supplier shall cleanse data throughout the contract term
1. **Lot 2 Business Services - Mandatory Deliverables**

Suppliers awarded a place on this framework shall comply with the following mandatory requirements:

* 1. **Service Delivery**

The areas of business processing the Supplier shall be required to provide include:

* **Payroll;**
* **Human Resources;**
* **Source to Pay; and**
* **Financial Accounting**
	1. The services provided by the Supplier will add value to the services provided by the Buyers ERP implementation. A “digital first” approach will be adopted as highlighted in the Summary Section.
	2. Suppliers are expected to have the capability to provide all services in section 8 to this document (although it is not compulsory for Buyers to buy all services - the Buyer will define what selection they wish to purchase at Call-Off). Suppliers may be required to accommodate specific requirements at Call-Off level.
		1. **Payroll**
1. General Payroll

Unless specifically requested by the Buyer, where a particular service is provided by the ERP, the expectation is that the Supplier shall support through exception handling only. Please note the following may include payroll activities for overseas staff in different currencies. Activities and processes relating to paying our people in a tax and National Insurance compliant manner, including routine payments such as a monthly or flexible payroll cycle, ad-hoc payment of supplements in line with Buyers policy and advances shall be provided by the Supplier, activities shall include but are not limited to:

* Flexible Pay Cycles;
* Payroll exception and error handling;
* Administering Employee Benefit Schemes such as Salary Sacrifice (including loans, childcare vouchers, cycle to work scheme);
* Administration of Injury Benefit and Third-Party Claims;
* Pay changes due to changes in working pattern/hours (including part month, weekend, shift and overtime working);
* Temporary promotion/temporary duty pay increases;
* Payroll Costing and transfer to General Ledger;
* Monthly Payroll Reconciliations;
* Gross to net;
* Pay Advances;
* Emergency Payments (including same day emergency payments);
* Overpayment Calculations and Recovery, including Gross and Net overpayments, Prior Year/Multi Year overpayments (including leavers);
* International Payroll & Deposits;
* Overtime, Allowance & Variations in pay, ensuring payments are processed in accordance to policy and applicable rates of pay (including payment of bonuses and recurring and non-recurring allowances);
* Payment for Occupations and Statutory Absence Schemes and scheme rules (including sickness, maternity, adoption, paternity and shared parental leave) in accordance with departmental absence policies and terms and conditions which may vary;
* Mark-time pay;
* Retroactive Payments/Deductions;
* Annual Salary Increases;
* Payroll reporting and analysis;
* Sickness entitlement monitoring including contractual entitlements rules and trigger points;
* Automatic Tax & legislation updates;
* HMRC legislative reporting and services, including RTI;
* BACS payments;
* Third Party Payments;
* CHAPS payments;
* Distribution and creation of Payslips, P45, P11D’s and P60;
* Payroll End of Year Activity, including Tax Code Uplifts;
* Payrolling relevant taxable expenses and benefits;
	+ Impacts from taxable expenses (Where not automated through the ERP);
	+ Sessional worker payments & fees (as referenced within the managing; the workforce section)
	+ Pay Award processing;
	+ Salary Sacrifice schemes;
* Pay management of sessional workers/Fee paid/contingent workers;
* Actioning staff transfers/loans/secondments in accordance with government guidance;
* Management of payroll implications of absences in accordance with government guidance e.g. Career Break, Industrial action deductions etc;
* Death in service; and
* Staff loans (season ticket etc.)
1. Payroll Support Services -

The Supplier shall deliver frontline support through omni-channel or self-serve routes for; query resolution, advisory services to end users and line managers, including but not limited to:

* Management & recording of Pay Related Queries;
* Payroll Calculations (such as, holiday, back-pay, overpayments, pensions contributions);
* Advisory Services for exceptions or process;
* Management of any Overpayments - with ability to apply flexible repayment plans in line with varying departmental policies in this space, including financial hardship and appeals process;
* Complete Earlier Year Update;
* Supply of data required by HMRC; and
* Gender pay gap reporting.
1. Expenses -

The Supplier shall be responsible for the management of the Buyer expenses payments in line with Buyer policies. This may include exclusion or quality checking of Buyer self-serve authorisation hierarchies against the Expenses policy. Please note the following list may include payroll activities for overseas staff in different currencies. Activities the Supplier shall be required to provide include, but are not limited to:

* Audit and Approval Check to Expense Claims prior to payment;
* Expenses Payments (including travel and subsistence and memberships); and
* Database and reporting of all expense claims relating to individuals and associated HR records/posting terms.
1. Allowances and Supplements -

The Supplier shall be responsible for processing and payment of additional allowances or supplements to an employee’s normal pay. The Supplier shall maintain allowance limits when policy changes, including but not limited to:

* Duty or Shift Management rates;
* Allowances such as professional, location or retention;
* Supplements such as subsistence;
* Temporary Duties Allowances;
* Require reporting for all the above and tracking of all loans given to employees to calculate tax due;
* Dual workplaces (in line with taxation rules); and
* International Assignees related allowances, such as COLA (Cost of Living Allowance).
1. Employee Rewards and Benefits (Bonuses and Pay Awards) -

The Supplier shall support the modelling, update and payment of employee pay awards and bonuses as required by the Buyer, activities the Supplier shall provide include. but are not limited to:

* Uplift salaries from effective date;
* Pay bonuses on effective date (Pay Award/Performance Related/Ad-hoc reward);
* Adjust salary pay bands;
* Uplift of allowances if applicable as part of Pay Award or any other required reviews (such as Cost of Living Allowance changes for overseas employees); and
* Reporting for all the above to calculate tax due.
1. Pensions -

The Supplier shall provide administration and processing of pensions activities, including, but not limited to:

* Employee and Employer Contributions;
* opt in/out;
* Queries;
* Monitoring of Annual Allowance and Lifetime Allowance (LTA), including notification to employees of approaching allowance thresholds;
* All forms of Retirement, including re-employed pensioners;
* Pension Transfers;
* Fulfil statutory and scheme management reporting and integration requirements for multiple Public Sector Pension Schemes;
* Dealing with error/warning reports as a result of Pensions’ interface;
* Forms of additional pension, including Added Pension, Added Years, Additional Voluntary Contributions and Early Pensions Age Allowance; and
* Changing of applicable pension rates as required by scheme (both for employee/employer contributions rates and changes in applicable thresholds).
1. Payroll End of Tax Year Activity -

The Supplier shall support legislative year end payroll activities as required by the Buyer.

* + 1. **HR**

Linked to HR global design, where required by the Buyer, the Supplier shall deliver the following services:

1. People strategy and planning, activities to include but are not limited to:

Supporting the Buyers reporting and data management to enable strategic HR planning, management of organisational design within ERP and ensure HR organisation is held within ERP accurately. To include all requirements for workforce planning reports for cross government level and buyer specific reports - Tracking headcount, efficiency, locations and skills forecast for HR, together with developing consistent workforce planning and skills frameworks aligned to the business planning cycle, including ensuring that any workforce planning activity supports future workforce projections/planning in line with business and people strategies. This includes the analysis of HR data alongside strategic objectives to ensure the workforce strategy aligns to business objectives; as well as any forward planning, whether short, medium or long term.

1. Managing organisations and positions, activities to include but are not limited to:

Creating and managing the organisational structures with the ERP and position management within ERP. For example, management of variation to the organisation’s terms and conditions across the employee base, including legacy terms and conditions at the direction of the organisation. The Supplier shall ensure that these are reflected accurately within ERP.

1. Joiners, movers and leavers:
2. Joiners - Recruitment and pre-employment screening activity for Central Government Buyers will be provided by the Government Recruitment Service (GRS), therefore only certain elements of the Joiners service will be required for these Buyers. Where this is the case, the Supplier will be required to provide a seamless interface between the GRS and the ERP for some of the activities below.

Where required by the Buyer, the Supplier shall deliver the following Services including supporting the onboarding of staff into the organisation and;

* Proactive candidate search, attract and source;
* Create/update/manage candidate pool;
* Job role design, create/edit/close job description;
* Reinstatement;
* Creation of job adverts and managing job advert library;
* Advertising on external websites;
* Creation of campaign specific microsites;
* Accessible candidate packs;
* Location specific recruitment strategies tied to workforce planning data;
* Psychometric tests for testing verbal, numerical and situational judgement;
* Ability to develop psychometric tests for specific roles (caseworks etc) and specialisms (accountancy etc);
* Utilisation of Success Profiles <https://www.gov.uk/government/publications/success-profiles> as candidate assessment framework for Central Government Departments;
* Pre-sifting written and video interview applications;
* Sifting method design;
* Panel member management;
* Interview logistics management;
* Video interviewing (integrated into recruitment platform);
* Virtual and physical assessment centre design and delivery
* Candidate ID checking and processing;
* On-site candidate handling during interview and assessment;
* Full Baseline Personnel Security Standard (BPSS) pre-employment checks;
* Security vetting;
* Compiling and sending new starter data to HR shared service providers;
* Provision of campaign performance data;
* Evaluation and analysis of campaign performance;
* Quality assurance processes to ensure SLAs are met;
* Management of candidate and vacancy holder (hiring manager) queries;
* Manage job offer/contract;
* Manage job offer withdrawal/Candidate withdrawal;
* Ensuring accurate creation of HR record in ERP (for all Employment / Appointment Status types in accordance with the global design principles);
* Pre-boarding and On-boarding checklist for new starters, a self-service task list for the new employee, manager and HR;
* Provision of data and information to enable issue of IT and building passes, such as National Security Vetting clearance levels;
* Issuing on induction material and joiners notifications;
* Recruitment knowledge, know-how and strategy core business capability;
* Talent marketplace insight – including future focused D&I to widen lens of talent;
* Proactive process improvement;
* Evidence of shared risk models / KPI;
* Candidate-centred recruitment strategy; and
* Recruitment process design delivering high value candidate & hiring manager experience:
	+ Expert, agile strategies to deliver;
	+ volume hiring;
	+ Experienced hire including niche and scarce skills; and
	+ Senior appointments.
1. Movers; the Supplier shall be required to administer the change and movement of employees around the internal organisation or externally (across the Civil Service for Central Government Departments), these can be individual or mass changes and TUPE or COSoP. Activities include but are not limited to:
* Managing changes to employee personal data including but not limited to address, marital status, next of kin and dependants. Managing work schedules, promotions, demotions including any changes to reward;
* Managing internal moves within the organisation ensuring that organisational and positional hierarchy is maintained;
* Managing loans between government departments, ensuring that payroll and terms and conditions follow process;
* Managing civil service employee transfers for Central Government Departments in accordance with the policies ensuring that payroll movements are affected efficiently within required timescales. Facilitating the transfer of HR and payroll records to the new department’s HR in order to maintain continuity of service; and
* Maintain and manage HR records on ERP for all Employment / Appointment Status types in accordance with the global design principles.
1. Leavers, the Supplier shall be required to administer the process of employees leaving the organisation including but not limited to:
* All Leaver types including Dismissals and Death in Service;
* Seasonal Workers and Fixed Term Appointments;
* Suspension of pay;
* Overpayment recovery;
* Management of P45 process;
* Termination of ERP record;
* Information and advice on return of IT and building passes; and
* Provision of information to pension provider for all leavers.
1. Building the workforce: The Supplier shall create and manage the learning and talent data and processes within the ERP including reporting to support Buyer decisions.
2. The Supplier shall be required to manage the workforce including but not limited to the following activities:
* To create, manage and report performance management and appraisal information within the ERP including 360 reviews;
* Manage absence recording within the ERP:

○ Attendance/absence records including payroll interface (Shifts, holiday booking, holiday entitlement, Time Off in Lieu, other categories of absence);

○ Administering attendance management procedures such as Sickness Absence Triggers, Part Time on Medical Grounds, Injury at Work and Third-Party Accident Claims;

○ Absence Guidance;

○ Absence reporting through (self-service/dashboards);

○ Administration of Sickness documentation; and

○ Query Resolution.

* Flexi Working and changes of working pattern - Processing and recording of all Flexi Working arrangements depending on Buyer requirements, including but not limited to Job Shares, term time, shift, compressed hours, annualised hours;
* Management of all employment and appointment status types (as defined in the Global HR Design) within ERP including starting and ending contracts and management of payments; and
* Conduct and grievance - to create maintain and report on grievance, conduct and discipline data within ERP.
1. Rewarding the workforce: The Supplier shall be required to undertake activities as outlined in payroll section, including but not limited to:
* Reporting of all Reward and Recognition given to employees including details of tax brackets.
1. Professional Services: The Supplier shall be required to provide advisory services by HR Professionals or certified professionals on, but not limited to:
* Disciplinary & Grievance;
* Occupational Health;
* Absence Management, triggers or warnings;
* Workplace Adjustments; and
* Employee Benefits.
	+ 1. **Source to Pay (S2P)**

The Supplier shall be responsible for the delivery of the following Source to Pay activities which include but are not limited to:

* Facilitating the efficient set up and maintenance of vendor data, procurement catalogues and categories;
* Creation and approval of purchase requisitions and purchase orders and issuing documentation to suppliers;
* Low value sourcing;
* Receiving and processing invoices/ credit notes, managing disputes;
* ensuring accruals and prepayments are accounted for;
* making payments;
* Recovery of payments made in error; and
* Administration of Government Procurement Card schemes.
	+ 1. **Financial Accounting**

The Supplier shall be responsible for the delivery of the following Financial Accounting activities which include but are not limited to:

1. Order to cash (O2C) -
* Facilitate the efficient set up and maintenance of customer data;
* Maintain collection strategies and catalogues;
* Issue invoices, managing and matching receipts and actioning unapplied receipts;
* Undertaking agreed actions on debt collection entering required adjustments, issuing credit notes and issuing refunds and actioning write offs;
* Interoperability between ‘Point of Purchase’ third party systems; and
* Where required by the Buyer, the Supplier shall provide transactional processing using merchant acquiring services the Supplier shall comply with Payment Card Industry Data Security Standards (PCIDSS) and provide periodic attestation of compliance to the Customer.

1. Cash management -
* Follow HMT guidance on cash management ensuring efficient and effective cash management and forecasting;
* Manage payments runs in accordance with cash forecasts;
* Undertake bank reconciliations and managing cash, cheques and electronic payments and receipts;
* Facilitate efficient and effective cash management, complying with HMT, GBS and, banking industry guidance and requirements;
* Undertake daily and monthly bank reconciliations and facilitate the resolution of unreconciled items in a timely manner;
* Facilitate the management of payments runs in accordance with cash forecasts, resolving exceptions e.g. payment failures and, actioning bank related notifications e.g. requests for information or, notifications of changes to payee (supplier / customer / employee) bank details;
* Manage the processes supporting the clearing of transactions (payments and receipts - cash, cheques and electronic methods of payment in or out) e.g. secure storage and banking of cheques and cash, provision and management of cash in transit services; and
* GBS compliant cheque printing, validation of cheques issued (e.g. Positive Pay) and, a BACS bureau (or equivalent for the New Payments Architecture and ISO20022 clearing infrastructure being introduced by Pay.UK and the Bank of England).

1. Grants Administration - Undertake accounts payable and receivable functions in respect of government grants.

1. Payroll - as per section 8.3.1.

1. Expenses -
* Manage set up and maintenance of employee data, expense categories, exchange rates and corporate credit cards;
* Manage advance payments and make booking on approved systems;
* Management of expense claims and payments; and
* Perform prepayment audit checks.

1. Inventory -
* Manage master inventory categories and attributes; and
* Perform transactional activity to ensure accurate recording of stock ensuring reconciliation to General Ledger.

1. Project accounting -
* Create and maintain project master data and project structure; and
* Perform S2P and O2C activities for all projects.

1. Record to report -
* Maintain chart of accounts, hierarchies, approval positions and exchange rates;
* Posting manual journals and recharges;
* Manage month end sub ledger and GL closure;
* End to end management of Payroll overpayments including interfaces with HMRC and Pension providers; and
* Reconciliation service for key control accounts (Sub ledger control accounts, bank accounts) and non-key balance sheet accounts (Overpayments).
1. Tax -
* Perform transactions and master data maintenance including tax rates and recovery and review open transaction reports;
* Automate the treatment of VAT and other taxes (e.g. CIS), using appropriate tax engines and setup;
* Require transactional reporting attaching VAT treatments and COS headings to transactions.
* Require automated creation of relevant tax returns
1. Non-current assets -
* Perform transactional and master data maintenance and run open transaction reports;
* Management of WIP, addition, depreciation and sale of assets;
* Management of asset revaluation data and calculations to create accurate asset register; and
* Coordination of annual physical verification of assets and impairment review of non-IT assets.
1. Finance Support Services
* Frontline support through omni-channel or self-serve routes for; query resolution, advisory services to end users Customers and Suppliers.
1. **Optional Deliverables**

It is desirable for the Suppliers to have the capability to provide the following optional Deliverables but are not compulsory to be on the Framework. These include but are not limited to the following:

* 1. Customer Guidance Tool

It is anticipated that the ERP interface will be used wherever possible, however, where required by the Buyer, the Supplier may provide a Customer Guidance tool which will enable end users to ask questions on policies, or how to perform a function. We anticipate that this will be delivered through bots or other leading technologies and have an integration to the ERP to link the user to the correct page providing a seamless user experience.

* 1. Legacy Services

It is envisaged that where possible, a Buyer will provide data to the Supplier to load into the Buyer’s ERP or archive solution (See section 7.11), Where this is not possible, the Supplier may provide a service to ensure they are able to access their legacy data. Where a Buyer requires Legacy services, they may either:

* Grant the Supplier access to use systems to access legacy data on their behalf; or
* Require the Supplier to host Legacy systems on their behalf.
	1. Reporting and Business Intelligence

Where the Supplier will be processing data for the various business functions of the Buyer, the Supplier may be required to provide a Data Analytics Capability to improve the efficiency, effectiveness, compliance and user experience of the Buyers Organisation. The Supplier may maximise the use of the reporting tools within the ERP, effectively extracting and analysing this data to better inform the Department of its business patterns, workflows and performance helping continuous improvement.

The various data solutions may include:

* Analytics;
* Visualisation tools; and
* Dashboards.

Where this service is provided, Suppliers will:

* Be responsible for the data quality of the data it processes, particularly around data accuracy and avoiding processes which risk data quality (such as manual inputs by the Supplier);
* Host any additional Data Services, which are outside of the Buyers ERP platform, in a cloud secure platform to be agreed with the Buyer (in alignment with ISO27100 requirements) and 9.7 Additional IT Services;
* Make available use of Geo-analytical capabilities;
* Where a hosted Data Service is provided, the Supplier shall provide an API interface; and
* Use secure APIs as a first approach where a Data Service is hosted.
	1. Information Technology Outsourcing (ITO) Services

The Supplier may provide a range of ITO services to the Buyer; however, it is expected ITO Services will primarily be purchased using different Frameworks (or may not be outsourced).

* 1. Application Management Services (AMS)

The Supplier may provide technical application support to the Buyer, such as:

1. Business Process & Security Maintenance

In the life of the application, updates may need to be made to business processes. This may include:

* Changes / additions to approvals;
* Rerouting of requests;
* Update / creation of security groups; and
* Facilitating Security Audits, Security Investigations or HR investigations as directed by the Buyer or relevant authorities.
1. Application Maintenance

The application may require regular maintenance through its lifecycle:

* Maintenance of system calendars;
* Maintenance of regular processes, interfaces and workflows; and
* Oversight of and participation in the testing of periodic application updates (including regression tests).
1. Application Change and Enhancement

Through the life of the application the Buyer may want to make enhancements and changes:

* Impact assessment of change requests and/or work orders; and
* Build, test and implementation of application configuration changes, updates, bug fixes and workarounds.

Advisory services on the implementation of pre-built patches that the Buyer has rights to deploy/is licensed to use by the relevant software Owner.

1. Data Management Services

Data Management services may include:

* Database management;
* Data migration support including support of any extraction, transformation and loading (ETL) processes necessary to support data migration;
* Data warehouse management; and
* Architecture support.
1. Service Management Appraisals

User Forum Appraisals may include:

* Forum for Users to discuss System management and highlight efficiencies and issues.
1. Identity and Access Management (IAM)

It is anticipated that Identity and Access Management will be provided through the ERP. The Supplier may provide implementation of advanced IAM policies where required by the Buyer that may include:

* Implementing and administering RBAC (Role Based Access Control) and LBAC (Location Based Access Control) as defined by the Buyer; and
* Security assurance will need to be in place for RBAC/LBAC policies
	1. Technical Support

The Supplier may provide access to application and infrastructure technical support to users where required by Buyer:

* Call logging and tracking;
* Issue identification and resolution;
* General technical advice; and
* The Supplier will be required to work proactively and in collaboration with the Buyer and other third parties, such as system vendors and technology partners.
	1. Additional IT Services

The Supplier may provide support services to applications that interface into the core ERP. This may include (but is not limited to):

* Third party and in-house systems;
* Data Service;
* Email gateway;
* BACS Services (or equivalent for the New Payments Architecture and ISO20022 clearing infrastructure being introduced by Pay.UK and the Bank of England);
* Online Banking functionality for the GBS supplier currently NatWest/RBS Bankline (e.g. for Faster Payments, CHAPS, and Bank statement data access)
* GBS approved cheque printing;
* Cheque validation services such as Positive Pay/BACS/CHAPS Payment
* Workflow Management;
* MS Office/Google;
* Health and Safety;
	+ - Audit tool;
		- Subject Access Requests;
		- Bank account/sort code checker;
		- Over/underpayments management;
		- Invoice rejections;
		- Image capture/scanning;
		- Complaints management;
		- Payment gateways and Direct Debits e.g. Open Banking PISP (Payment Initiation Service Provider); and
		- Open Banking AISPs (Account Information Service Provider).

These services will only be provided where the service is not available through the ERP.

* 1. Security Operation Centre (SOC) and Network Operation Centre (NOC) Services

It is anticipated that the ERP will provide SOC and NOC capabilities. Where required by the Buyer, the Supplier may provide these services or provide integration services into the existing SOC and NOC.

* Where the Supplier is providing an Additional IT Service, Security Assurance shall be in place and granted by the Buyer. Activities will include:
	+ Analysing events;
	+ Determining risk levels and assets affected;
	+ Performing troubleshooting and incident response on the systems;
	+ Recommends or executes remedial action;
	+ Communicating with site technicians or third parties responsible for resolution; and
	+ Track issues through to resolution.

* 1. ERP Support/Maintenance

It is anticipated that Central Government Buyers will be procuring their ERP separately but where required, the Supplier may provide support to maximise the value of the Buyers investment on behalf of the Buyer, Suppliers may be required to:

* Configure the ERP, including Master Data Management;
* Manage patches and releases;
* Provide day to day operation activities; and
* Provide Change/Configuration/Build/Release Management Services. Standards such as the ITIL Framework shall be adhered to where these services are provided.

Some Buyers may procure their ERP through this framework. Buyers may require the Supplier to manage procurement of the ERP through other CCS frameworks. Alternatively, Buyers may require the supplier to provide the ERP or source directly from the ERP provider. The Supplier shall be responsible for implementing and integrating the ERP platform.

* 1. Extensions/Modifications

The Supplier may be required to design, develop, support, manage and maintain existing or new:

* Extensions;
* Modifications;
* Integrations;
* Localisations; and
* Configuration.

on any services provided in section 9.2 (Legacy Services), 9.6 (Additional IT Services) or 9.8 ERP Support and Maintenance.

The Supplier may be engaged to manage BAU/SaaS updates and continuous improvements. This may include services shown in the Application Managed Services in section 9.5.

* 1. Value Added Service Requirements

Suppliers are expected to provide as a minimum, the following value-added services at Framework level at no additional charge to any Buyer, these may include but are not limited to:

1. Deployment of webchat/or other non-voice channels;
2. Provision of RPA tools;
3. CSAT/NPS auto survey;
4. Customer experience strategy consulting;
5. Digital strategy consulting and enablement;
6. Knowledge management Database creation;
7. App Deployment and Messaging;
8. AI deployment;
9. Email translation services; and
10. Language translation services.

Where available, Suppliers shall, over the course of any Call-Off contract, proactively offer any further additional services outside of this list where appropriate, at no additional charge to the Buyer

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**Annex A - GSS Enterprise Architecture diagram**



1. **Social Value**
	1. Social Value legislation places a legal requirement on all public bodies to consider the additional social, economic and environmental benefits that can be realised for individuals and communities through commissioning and procurement activity, and, in Scotland, to deliver them. These benefits are over and above the core deliverables of Contracts. General information on The Social Value Act can be found at:

## <https://www.gov.uk/government/publications/social-value-act-introductory-guide>

Recently updated social value themes for public bodies can be found on this link:

## <https://www.gov.uk/government/publications/procurement-policy-note-0620-taking-account-of-social-value-in-the-award-of-central-government-contracts>

* 1. The following Social Value priorities are intrinsic to the Specification for this Framework Contract:
* Modern Slavery - see Paragraph 10.4 below
* Standards in the Supply Chain 10.5 below
* COVID-19 Recovery 10.6 below
* Delivering a Diverse Supply Chain 10.7 below
* Accessibility 10.8 below
* Economic equality 10.9 below
* Equal opportunity 10.10 below
* Wellbeing 10.11 below
* Climate change 10.12 below
	1. Buyers may identify further specific Social Value priorities based on the updated social value themes during a Call-Off Procedure which are aligned with the areas we have identified (in conjunction with Buyers) in Framework Schedule 1, below.
	2. **Modern Slavery**
		1. CCS requires Suppliers to comply with the provisions of the Supplier Code of Conduct <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/779660/20190220-Supplier_Code_of_Conduct.pdf> and the standards set out in Joint Schedule 5 on Corporate Social Responsibility including the reporting (see Framework Schedule 5 Management Charges and Information) and continuous improvement (see Call-Off Schedule 3 Continuous Improvement) requirements. Suppliers shall further support the elimination modern slavery throughout their supply chains for example, by:
1. The Suppliers shall at all times be compliant with the provisions of the Modern Slavery Act 2015.

<http://www.legislation.gov.uk/ukpga/2015/30/contents/enacted>

1. The Suppliers shall annually complete the Modern Slavery Assessment Tool as directed by CCS.

<https://supplierregistration.cabinetoffice.gov.uk/msat>

1. The Suppliers shall make the outcomes of their Modern Slavery Assessment available to the Buyer when requested
2. **Standards in the supply chain**
3. Labour standards in the supply chain - CCS and Buyers expect that Framework Suppliers will address and manage the risk of labour standards violations in the supply chain. The Supplier shall be aware of and adhere to:
4. where applicable, the International Labour Organization (“ILO”) Forced Labour Protocol;
5. where applicable, OECD Guidelines on Conflict Minerals <http://www.oecd.org/daf/inv/mne/mining.htm>; and
6. duties imposed on commercial organisations by the Modern Slavery Act 2015 in relation to transparency in the supply chain. <http://www.ilo.org/global/lang--en/index.htm>.
7. **COVID-19 recovery**
8. In practical ways, COVID-19 recovery means conducting or enabling contributions and activities that:
9. Improve workplace conditions that support the COVID-19 recovery effort including effective social distancing, remote working, and sustainable travel solutions;
10. provide protections for people and the community who are at risk of being worse affected, who are shielding or are experiencing mental and psychological challenges to their wellbeing;
11. Adopting a flexible approach to working for employees, Suppliers shall encourage this activity in order to promote a healthy work/life balance and positive wellbeing; and
12. Create employment, re-training and other return to work opportunities for those left unemployed by COVID-19, particularly new opportunities in high growth sectors.
13. Covid-19 recovery also includes *tackling economic inequality* by conducting or enabling contributions and activities that promote the **resilience, capacity and diversity of supply chains (as per paragraph 5 below)**.
14. **Delivering a diverse Supply Chain**
	1. CCS and Buyer(s) want to ensure a diverse base of Suppliers and resilient supply chains. We require the Supplier to support delivery of this through activities such as:
15. Enabling accessibility through promotion of supply chain opportunities with SMEs & Social Enterprises. We expect our Suppliers to support and build supply chain diversity through:

1. Supply chain processes that enable the participation of Micro, Small to Medium Sized Enterprises (SMEs) and Social Enterprises (SEs);

1. Subcontracting opportunities are open to Small to Medium Sized Enterprises (SMEs) and Social Enterprises (SEs), including the advertisement of all subcontracting opportunities over £25,000 on Contracts Finder as per Joint Schedule 12, Supply Chain Visibility;

1. Cascading prompt payment throughout Supplier supply chains as per Paragraph 4: Pricing and Payments of the Core Terms; and

1. Growth & Development through provision of advice and support to SMEs & SEs to develop resilient local supply chains.
2. CCS will expect Suppliers to measure and report the number, value and % of total contract spend of opportunities awarded to: SMEs, VCSEs, Mutuals as per Joint Schedule 12
3. Suppliers will have an obligation to advertise supply chain opportunities
4. The Supplier shall ensure that all Sub-Contracts, which the Supplier intends to procure following date of this Call Off Contract, and which the Supplier has not, before the date of this Call Off Contract, already awarded to a particular Sub-Contractor, are:
5. advertised; and
6. awarded following a fair, transparent and competitive process proportionate to the nature and value of the Sub-Contract.
7. **Supplier Accessibility Responsibilities**
	1. Where required by Buyers, Suppliers shall provide suitable hardware and software to meet the diverse user needs. This may include individuals with a visual, auditory, physical, speech, cognitive, language, learning, behavioural or neurological impairment, as well as the needs of users for whom English is not their first language.
	2. Suppliers shall assist Buyers in fulfilling their legal obligations with regards to accessibility, by offering help and guidance on how the Services can either support or be tailored to the Customer’s needs.
	3. Where required by a Buyer, the Supplier shall provide an accessibility statement for Services provided under a Call-Off Contract.
	4. The Supplier shall where relevant maintain an accessibility policy, and identify (and where requested provide the details to Buyers) a role or department within their organisations with responsibility for the policy.
	5. Improving the experience of service users with specific diversity profiles or needs e.g. undertaking staff sensitivity training, fostering a culture of respect for Buyers of diverse profiles, ensuring accessibility, including (but not limited to);
8. Supplier’s website and any mobile applications are accessible, i.e. New websites and mobile applications designed to deliver the Services shall meet WCAG 2.1 AA accessibility standard *by the date of your first call-off.* no later than 23 September 2019 (websites) and 23 June 2021 (mobile applications). Guidance on understanding WCAG 2.1 may be found here <https://www.gov.uk/service-manual/helping-people-to-use-your-service/understanding-wcag>.
	1. **Economic Equality**
	2. Suppliers shall have a fair and equal pay policy and aim to pay all employees the National Living Wage, irrespective of age where the same role is being performed. The Supplier shall ensure compliance with the National Minimum Wage and National Living Wage legislation:

<https://www.gov.uk/national-minimum-wage-rates> ;

* 1. All organisations with 250 or more employees shall publish and report specific figures about their gender pay gap, and we expect Suppliers to progress towards equalising this;
	2. The Supplier shall ensure compliance with the Working Time Directive in relation to delivery of any part of the Services. <https://www.gov.uk/maximum-weekly-working-hours>;
	3. Tackle inequalities through upskilling and supporting people to be successful in employment, especially those from vulnerable or disadvantaged groups; and
	4. Pay people fairly for the work they do and work with other companies with similar values and policies.
	5. **Equal Opportunity**
1. We expect Suppliers and their Supply Chains to support and encourage employment and skills development opportunities through the performance of this Framework Agreement, with a specific focus on opportunities for priority groups within the local community, including but not limited to:
2. people with disabilities;
3. Ex-offenders;
4. BAME; and
5. long-term unemployed.
6. This support may be through various activities such as, for example:
7. Apprenticeship and work experience placements;
8. Part-time and full-time employment and flexible working opportunities;
9. Supporting individuals to fulfil their potential with further education, employment or training e.g. coaching, mentoring, CV and interview skills;
10. Providing funded training and professional development opportunities for existing employees; and
11. Offering a range of employee assistance schemes.
	1. **Wellbeing & Community Benefits**
12. CCS and Buyer(s) expect the Supplier to positively impact individual wellbeing and contribute to transforming our local communities in a real and sustainable manner through activities, such as (but not limited to):
13. Supporting local businesses (not currently part of the existing supply chain) e.g. SMEs & SEs;
14. Creating cohesive communities: initiatives to support vulnerable people and address social issues such as homelessness, loneliness such as (but not limited to) donations to charities, staff volunteering, fundraising activities, befriending schemes etc;
15. Staff wellbeing e.g. promoting awareness about mental health, substance misuse, domestic abuse, first aid training, anti-bullying campaigns, gender equality and diversity and inclusion training etc;
16. Providing funded training and professional development opportunities for priority groups and lower skilled individuals not employed by the Supplier within the community; and
17. Ensure, as a minimum, all legislative requirements are adhered to for employee’s home working and shall conduct health & safety reviews and home working assessments.
	1. **Fighting Climate Change**
		1. **Environmental Sustainability.**
18. Suppliers shall contribute towards the public sector’s goal of improving the sustainability of ICT purchases and their operation via the Services supplied to Buyers under this Framework Contract;
19. Suppliers shall, where required, support Buyers in developing their environmental policies, by providing advice on the best use of Services supplied and where appropriate by proposing innovative Services;
20. Suppliers are required to consider the impacts of their business processes on the environment and take measures to reduce such impact including by supporting where possible the Government’s Environmental Policy and Sustainable Development Plan: <https://www.gov.uk/government/sustainable-development> ; and
21. The supplier shall demonstrate how it delivers the sustainability agenda as detailed in the Outsourcing Playbook: <https://www.gov.uk/government/publications/the-outsourcing-playbook>
22. **Energy Efficiency**
23. Suppliers shall consider the energy efficiency of all Goods and/or Services offered to Buyers and provide appropriate solutions and advice:

DEFRA: https://www.gov.uk/government/publications/sustainability-in-information-and-communication-technology-ict-a-defra-guide

Certification of Energy Efficiency for Data Centres: <https://www.ceedacert.com/>

1. **‘Carbon Footprint’ measurement**
2. Suppliers shall provide Information, where required by the Buyer, on all relevant products and Services to assist Customers in the task of calculating their total carbon footprint.
3. **Waste Management**
4. Suppliers shall ensure that they have adequate waste management solutions for the Services; and
5. Suppliers shall, where requested, provide Buyers with a waste management strategy for the Services including refresh, refurbishment or reuse of equipment and environmental recovery, recycling or disposal options.

External links for guidance:

WEEE Directive:

<http://www.environment-agency.gov.uk/business/topics/waste/32084.aspx>

and

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32002L0096:EN:NOT>

RoHS Regulations:

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

1. **Measurement and reporting**
2. Suppliers are required to develop and maintain a plan throughout the life of the Framework Contract detailing how the Supplier will contribute to the overall achievement of our Social Value priorities. For the avoidance of doubt:
3. The Social Value commitments and targets made during the Call-Off Procedure will form part of the contractual agreement between the Buyer and the Supplier, therefore bidders should only commit to activities that are within their capacity and capability to deliver;
4. Social value forms part of the quality criteria and will be evaluated independently of price. Suppliers are therefore strongly advised not to include any additional costs related to social value as part of the price submission as this may negatively impact the competitiveness of Supplier overall tender submission;
5. The Supplier shall provide an implementation plan to the Buyer detailing how the required Social Value commitments will be delivered through the Call-Off Contract; and
6. Buyers and Suppliers will jointly agree the timeline for delivering the targets and measures that were committed to by the Supplier during the Call Off Procedure.
7. Delivering Social Value -
8. The Supplier shall manage, measure and report on the delivery of Social Value throughout the life of all Call-Off Contracts under this Framework Agreement;
9. The Supplier shall provide an annual Social Value Delivery Statement to CCS detailing the Social Value that has been delivered through Call-Off Contracts under this Framework; and
10. As part of the Civil Society Strategy implementation CCS reserves the right to publish information on the delivery of Social Value through this Framework and may contact suppliers requesting case studies for the purpose of increasing awareness and sharing knowledge.

**ANNEX B – Pricing Definitions**

Lot 1

Contact Centre Agents - Role Definitions

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Entry level agent or equivalent |  | Intermediate agent or equivalent | Advanced agent or equivalent | Back office agent or equivalent | Team leader or equivalent |
| Education | No professional qualifications are needed but there is a requirement for basic education. |  | No professional qualifications are needed but there is a requirement for basic education, GCSE passes preferable (English and Maths specifically) | Professional qualifications are required for the role. NVQ/City and Guilds in Contact Centre Services | No professional qualifications are needed but there is a requirement for basic education, GCSE passes preferable (English and Maths specifically) | Professional qualifications are required for the role. NVQ/City and Guilds in Contact Centre Services |
| Time to competence | Minimal training with competence achieved in less than 3 months. Requirement to be customer facing (voice skill required) |  | Formal and on job training or experience within the role, with competence achieved in 3 – 12 months. Requirement to be customer facing (voice skill required).Multi-skilling across multiple products and capability to work across different systems / technologies | Extensive training or experience within the role, with competence achieved after 12 months. Voice skill with ability to manage multiple complex systems and products  | Minimal training with competence achieved in less than 3 months. No voice skill required | Extensive training or experience within the role, with competence achieved after 12 months. Voice skill with ability to manage multiple complex systems and products  |
| Knowledge area | Minimum number of subject areas and minimum depth of knowledge required. Limited flexibility between processes/systems/clients needed to complete this role.  |  | Small number of subject areas with large depth of knowledge required or large number of subject areas with little depth of knowledge required. Integration and multiple use of processes and systems. | Large number of subject areas with large depth of knowledge required. Excellent knowledge of processes and systems. | Small number of subject areas with large depth of knowledge required or large number of subject areas with little depth of knowledge required. Integration and multiple use of processes and systems. | Large number of subject areas with large depth of knowledge required. Excellent knowledge of processes and systems. Ability to coach and manage a group of people delivering day to day operations |
| Decision making | Works to clear and rigid guidelines and minimal or no decision making required. Anything outside of guidelines must be escalated. |  | Requires own judgement to make decisions, though an escalation point may still be required. | Role requires ability to make decisions using significant discretion and judgement and may be involved in implementation of changes. | Clear and rigid guidelines and minimal or no decision making required. Anything outside of guidelines must be escalated. | Owns the day to day targets, ensuring that the team are skilled, organised and motivated to deliver the targets. |
| Financial authority | Minimal – role requires only basic transactional financial authority. These limits are pre-set and are defined on the process maps. |  | The role requires an understanding of the impact on the budget and this is applied when agreeing transactions. Authority within specified limits but there will be a need to use a degree of judgement. | Ability to impact on budgets/costs will be high and financial authority may be within greater specified limits. A greater degree of judgement may be applied in order to gain closure. | Minimal – role requires only basic transactional financial authority. These limits are pre-set and are defined on the process maps. | Owns the team financial parameters and can prioritise the activities to ensure targets are met and/or contingencies are put in place. |
| Change/business improvement | Can suggest a potential improvement to the process they are involved with. Can identify that a process can be done better. |  | The requirement is to identify the need for change and produce recommendations. | Identifies the need for a business/change improvement and can make recommendations for implementation. Within this role there would be a requirement to build a business case based on knowledge gained via the role and have a basic understanding of the potential cost savings and business benefits. | Can suggest a potential improvement to the process they are involved with. Can identify that a process can be done better. | Listens and understands the opportunities to improve the services. Can implement these in own team and propose broader service application to site and contract managers. Implements change effectively within own team environment |
| Customer relationship | Transactional – basic fulfilment. A transaction that includes little or no advice, counselling or recommendations is performed. |  | Service provision – the role requires the handling of queries from customers and there is a need to have a good understanding of the customer’s requirement and how or who is best able to fulfil it. The role requires an ability to communicate with customers across various media. | Contact will require enhanced authority to influence, impact and manage the relationship with the customer | Transactional – basic fulfilment. A transaction that includes little or no advice, counselling or recommendations is performed. | Contact will require enhanced authority to influence, impact and manage the relationship with the customer, including the management of attrition back fill |
| Client relationship | No Client contact although there will be an understanding of who they are and the importance of the service the role provides on behalf of the client. |  | Client contact. Produces and provides information or service direct to the Client. | Managing the Client expectations and perceptions of the organisation. Influence and impact the Client. | No Client contact although there will be an understanding of who they are and the importance of the service the role provides on behalf of the client. | Managing the Client expectations and perceptions of the organisation. Influence and impact the Client. |
| Control of work | Flexibility to control input or output for majority of time. |  | Medium volume with little or no control of work. | High volumes with little or no control over input and output of work for the vast majority of the time. | Flexibility to control input or output for majority of time. | Manages the flow of work on behalf of the team to ensure that optimal services are being delivered through the group to service targets |
| Mental demand of job | Low due to repetitive tasks and clear guidelines on requirements.  |  | Medium due to the need to make judgements on courses of action. May deal with unhappy/frustrated & hard to understand service users. | High due to the range of expectations on the role. May deal with angry, abusive, frightened, vulnerable service users. | Low due to repetitive tasks and clear guidelines on requirements.  | High due to the range of expectations on the role. May deal with angry, abusive, frightened, vulnerable service users. |

Contact Centre Implementation - Role Definitions

|  |
| --- |
| Contact Centre Implementation - Level Definitions |
|  | Entry Level | Intermediate  | Advanced | Manager | Senior Manager | Director |
| Job Description | - Individual contributor who supports operations in completing the daily tasks. | - Individual contributor who supports operations in completing the daily tasks. | - Provides operational or technical support at a specialist level. - Section leadership; technical reference point | - Manages the execution of business process improvements. Selects, tailors and implements business process improvement methods and tools | - Develops organisational policies, standards, and guidelines for business process improvement which allow the organisation to quickly improve and implement business processes to meet business requirements. | - Directs the creation and review of a cross-functional, enterprise-wide approach and culture for embracing business process management and improvement. |
| Knowledge level | - Have good analytical and communication skills | - Have knowledge of a function, capability and/or industry- Have strong analytical skills, along with excellent verbal, written and presentation skills  | - Have specialised knowledge of a function, capability and/or industry | - Have deep expertise in at least one function, capability and/or industry | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | - Adminsters project documentation to support delivery | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | Sets direction and leads in the introduction and use of techniques, methodologies and tools, to meet overall business requirements, ensuring consistency across all user groups. Leads and plans business process improvement activities to analyse business processes; identify alternative solutions, assess feasibility, and recommend solutions which exploit new technologies and automation. | - Drives the identification, evaluation and adoption of technologies to transform organisational agility; customer and user experience; improve supply chains and exploit business opportunities. |
| Experience | - Typically requires 0-1 years of general work experience | - Typically requires 1-2 years of related experience  | - Typically requires 3-4 years of related experience  | - Typically requires5 years’ experience | - Will typically have acquired at least the 2 yrs. of Supervisory level orprofessional level experience before becoming a manager.- Typically requires 5 years of professional experience | - Typically have over 10 years experience |

Contact Centre Consultancy - Role Definitions

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Junior Consultant or equivalent | Consultant or equivalent | Senior Consultant / manager or equivalent | Principal Consultant or equivalent | Managing Consultant/ Associate Director / Director or equivalent | Partner/Managing Director or equivalent |
| Job Description | Demonstrable experience and relevant exposure in a range of projects in a specialist field. Evidence of client facing experience and relationship management. Support for planning and monitoring budgets and services to wider consultancy projects; and experience of proposal preparation.  | Notable subject matter experience, in-depth knowledge and relevant experience of their specialist fields. Evidence of a wide range of consultancy projects and client facing experience. Support work in process and organisational design and leading workshops and events. Actively seeks out work from senior managers | Management of engagements and projects adhering to professional standards and strict costs controls. Substantial proven experience in their specialist field and in a consultancy / training role. Previous experience in the project management in a wide range of high quality and relevant projects. Familiarity of the issues / problems facing public sector organisations | Recognised expert in customer services design & delivery, call/contact/engagement centre services and in a consultancy/training role. Significant proven relevant experience managing a full portfolio of clients in a variety of complex projects. Sound knowledge of the public sector, current policy and political issues. Assists in fee proposals.Previous experience in project management on at least three major projects, preferably in the public sector and using the PRINCE2 or recognised project management methodology.  | Substantial experience in customer services design & delivery, call/contact/engagement centre services and operating multiple major consultancy assignments achieving specific revenue and income objectives to agreed outcomes. Previous experience in recruiting and managing remote teams, project billing, project and risk management on at least five major projects. Advises client Senior Management Teams and Directors in the commercial and public sectors. Use of PRINCE2 or recognised project management methodology. In depth knowledge of the public sector, current policy and the political issues affecting it. Typically, we would expect a person within this category to have significant, proven, industry recognised experience | Extensive achievement in customer services design & delivery, call/contact/engagement centre services, in which they are highly renowned. Extensive experience of leading or directing major, complex and business-critical projects, bringing genuine strategic insight, understanding the range of services to be delivered to the client. In depth knowledge of the public sector and of current policy and political issues affecting it. |
| Knowledge level | - Have good analytical and communication skills | - Have knowledge of a function, capability and/or industry- Have strong analytical skills, along with excellent verbal, written and presentation skills  | - Have specialised knowledge of a function, capability and/or industry | - Have specialised knowledge of a function, capability and/or industry | - Have deep expertise in at least one function, capability and/or industry | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | - Identifying and researching information sources- Gathering and interpreting data- Executing qualitative and quantitative analysis- Interacting with customer stakeholders | - Analysing and modelling data- Drawing out high quality insights- Creating slides to present recommendations- Meeting with customer stakeholders to understand their issues | - Managing the project across multiple workstreams- Prioritising the team's workload- Bringing together the team's inputs into coherent recommendations- Engaging customer stakeholders including presenting recommendations | - Designing the project structure- Providing leadership and coaching to internal project team members- Contributing to the development of customer-facing presentations- Leading on the delivery of presentations of recommendations to customer stakeholders | - Providing leadership to the project team and the customer- Reviewing and improving the project team's recommendations- Providing relevant thought leadership and expertise to the customer- Forming strong working relationships with customer stakeholders | - Being accountable for overall project delivery and overseeing knowledge transfer to customer- Bringing innovative strategic insight and best practice- Applying relevant private and public sector knowledge including policy and political issues- Delivering results that meet or exceed customer expectations- Developing strong customer relationships with senior stakeholders |
| Experience/ | - Typically have up to 2 years’ experience | - Typically have between 2 and 4 years’ experience | Typically have between 5 and 6 years’ experience | - Typically have between 7 and 8 years’ experience | - Typically have over 8 years’ experience | - Typically have over 10 years’ experience |

Lot 1 Additional Pricing Definitions

|  |  |
| --- | --- |
| Available Hour  | means agent hours available to engage in Buyer related contracts(s). Typically, this will exclude the following: lunch break, breaks, absence, sickness, holiday and meetings concerning delivery of the contract(s); |
| Productive Hour  | means agent hours actively engaged in Buyer related contract(s). Typically, this will exclude the following: lunch break, breaks, absence, sickness, holiday and meetings concerning delivery of the contract(s); |
| Contracted Hour  | means agent hours that are paid for by the Buyer. Typically, this is 37.5 working hours per week based upon a 40hour week with 30minutes each day for a lunch break;  |
| Attended Hour | agent hours that are engaged in work related activities. Typically, this does not include absence, sickness and holiday;  |
| Out of Hours  | means the period of time that, for commercial pricing purposes, are not the usual hours of business or work, but where services may still be provided. Typically, these would be anytime outside 07:00 to 20:00 Monday - Sunday, any public holidays in England and Wales unless specified otherwise by the Parties in the Order Form;  |
| Shrinkage | means the number of agents actively taking calls divided by the number of agents who are not available for any reason. This can include holidays, sickness, breaks, after call work or wrap. Shrinkage is usually expressed as a percentage and is used to calculate the total number of agent resources required to deliver the contract(s);  |
| Attrition | means when an employee leaves the call centre supplier and the supplier does not replace the employee. Attrition is usually expressed as a percentage from the employees that have versus the overall number of employees.  |
| Staff Turnover | or employee turnover rate, is the measurement of the number of employees who leave an organization during a specified time period, typically one year and need to be replaced. Typically expresses as a percentage. Divide the sum total of the number of employees that leave within a specific period of time (month, quarter, year, etc.) by the average number of employees that work within the selected time frame. Multiply that number by 100 to calculate the employee turnover rate. |
| Utilisation | means the percentage of time an agent spends actively on calls or performing call-related work. Utilisation is usually expressed as a percentage of the ratio of work performed divided by overall capacity;  |
| Sites | means any premises (including the Customer Premises, the Supplier’s premises or third-party premises) from, to or at which: the Goods and/or Services are (or are to be) provided; or the Supplier manages, organises or otherwise directs the provision or the use of the Goods and/or Services;  |
| Agents  | means the individual (s) delivering the service;  |
| Historic Volumes | means activity that has previously been delivered; |
| Core Hours  | 07:00 - 20:00 Monday to Sunday |

Lot 2

HR Delivery – Role Definitions

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Entry Level | Intermediate  | Advanced | Manager | Senior Manager | Director |
| Job Description | - Individual contributor who supports operations in completing the daily tasks.- Transactional roles within the services provided | - Individual contributor who supports operations in completing the daily tasks. - Transactional roles within the services provided | - Provides operational or technical support at a specialist level. - Section leadership; technical reference point | - Manages a team/provides administrative or technical support at a Teamleader level. - Process Leadership & act as escalation reference point. | - First line manager that directs the activities of a small staff ofprofessionals and support staff. - Operations leadership, Next level escalation and Overall Supervision. | - Have a wide range of leadership responsibilities |
| Knowledge level | - Beginner level and possess knowledge for completing the tasksassigned. | - Experienced and possess knowledge for completing the tasks assigned | - Individuals are highly proficient in a broad range of activities related totheir job. - Considered in the department as the "knowledge base". | - Individuals are highly proficient in a broad range of activities related totheir job. - Point person to resolve issues elevated by support personnel. - Incumbent continue to the development of process and procedures. | - May also be a level above a supervisor within high volumeadministrative / production environments | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under close direction of senior personnel in the functional area. | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under moderate supervision and may seek the advice of seniorpersonnel in the functional area. | - Individuals independently perform a wide range of complex dutiesunder general guidance from supervisors. - May act as lead, SME or mentor to more junior technical oradministrative support personnel | - Works as Team lead / SME and mentor to specialist and administrativesupport personnel. - Monitor the performance of specialist /specialty and admin level. - Performing wide range of complex duties under general guidance fromsupervisors. | - Managers at this level may regularly apply expertise in day-to-dayactivities with their acquired expert and knowledge.  | - Being accountable for overall project delivery and overseeing knowledge transfer to customer- Bringing innovative strategic insight and best practice- Applying relevant private and public sector knowledge including policy and political issues- Delivering results that meet or exceed customer expectations- Developing strong customer relationships with senior stakeholders |
| Experience | - Typically requires 0-1 years of general work experience | - Typically requires 1-2 years of related experience  | - Typically requires 3-4 years of related experience  | - Typically requires 4 years’ experience | - Will typically have acquired at least the 2 yrs. of Supervisory level orprofessional level experience before becoming a manager.- Typically requires 5 years of professional experience | - Typically have over 10 years’ experience |
| Source to Pay Delivery – Role Definitions |
|  | Entry Level | Intermediate  | Advanced | Manager | Senior Manager | Director |
| Job Description | - Individual contributor who supports operations in completing the daily tasks.- Transactional roles within the services provided | - Individual contributor who supports operations in completing the daily tasks. - Transactional roles within the services provided | - Provides operational or technical support at a specialist level. - Section leadership; technical reference point | - Manages a team/provides administrative or technical support at a Teamleader level. - Process Leadership & act as escalation reference point. | - First line manager that directs the activities of a small staff ofprofessionals and support staff. - Operations leadership, Next level escalation and Overall Supervision. | - Have a wide range of leadership responsibilities |
| Knowledge level | - Beginner level and possess knowledge for completing the tasksassigned. | - Experienced and possess knowledge for completing the tasks assigned | - Individuals are highly proficient in a broad range of activities related totheir job. - Considered in the department as the "knowledge base". | - Individuals are highly proficient in a broad range of activities related totheir job. - Point person to resolve issues elevated by support personnel. - Incumbent continue to the development of process and procedures. | - May also be a level above a supervisor within high volumeadministrative / production environments | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under close direction of senior personnel in the functional area. | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under moderate supervision and may seek the advice of seniorpersonnel in the functional area. | - Individuals independently perform a wide range of complex dutiesunder general guidance from supervisors. - May act as lead, SME or mentor to more junior technical oradministrative support personnel | - Works as Team lead / SME and mentor to specialist and administrativesupport personnel. - Monitor the performance of specialist /specialty and admin level. - Performing wide range of complex duties under general guidance fromsupervisors. | - Managers at this level may regularly apply expertise in day-to-dayactivities with their acquired expert and knowledge.  | - Being accountable for overall project delivery and overseeing knowledge transfer to customer- Bringing innovative strategic insight and best practice- Applying relevant private and public sector knowledge including policy and political issues- Delivering results that meet or exceed customer expectations- Developing strong customer relationships with senior stakeholders |
| Experience | - Typically requires 0-1 years of general work experience | - Typically requires 1-2 years of related experience  | - Typically requires 3-4 years of related experience  | - Typically requires 4 years’ experience | - Will typically have acquired at least the 2 yrs. of Supervisory level orprofessional level experience before becoming a manager.- Typically requires 5 years of professional experience | - Typically have over 10 years’ experience |
| Finance Delivery – Role Definitions |
|  | Entry Level | Intermediate  | Advanced | Manager | Senior Manager | Director |
| Job Description | - Individual contributor who supports operations in completing the daily tasks.- Transactional roles within the services provided | - Individual contributor who supports operations in completing the daily tasks. - Transactional roles within the services provided | - Provides operational or technical support at a specialist level. - Section leadership; technical reference point | - Manages a team/provides administrative or technical support at a Teamleader level. - Process Leadership & act as escalation reference point. | - First line manager that directs the activities of a small staff ofprofessionals and support staff. - Operations leadership, Next level escalation and Overall Supervision. | - Have a wide range of leadership responsibilities |
| Knowledge level | - Beginner level and possess knowledge for completing the tasksassigned. | - Experienced and possess knowledge for completing the tasks assigned | - Individuals are highly proficient in a broad range of activities related totheir job. - Considered in the department as the "knowledge base". | - Individuals are highly proficient in a broad range of activities related totheir job. - Point person to resolve issues elevated by support personnel. - Incumbent continue to the development of process and procedures. | - May also be a level above a supervisor within high volumeadministrative / production environments | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under close direction of senior personnel in the functional area. | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under moderate supervision and may seek the advice of seniorpersonnel in the functional area. | - Individuals independently perform a wide range of complex dutiesunder general guidance from supervisors. - May act as lead, SME or mentor to more junior technical oradministrative support personnel | - Works as Team lead / SME and mentor to specialist and administrativesupport personnel. - Monitor the performance of specialist /specialty and admin level. - Performing wide range of complex duties under general guidance fromsupervisors. | - Managers at this level may regularly apply expertise in day-to-dayactivities with their acquired expert and knowledge.  | - Being accountable for overall project delivery and overseeing knowledge transfer to customer- Bringing innovative strategic insight and best practice- Applying relevant private and public sector knowledge including policy and political issues- Delivering results that meet or exceed customer expectations- Developing strong customer relationships with senior stakeholders |
| Experience | - Typically requires 0-1 years of general work experience | - Typically requires 1-2 years of related experience  | - Typically requires 3-4 years of related experience  | - Typically requires 4 years’ experience | - Will typically have acquired at least the 2 yrs. of Supervisory level orprofessional level experience before becoming a manager.- Typically requires 5 years of professional experience | - Typically have over 10 years’ experience |
| Payroll Delivery – Role Definitions |
|  | Entry Level | Intermediate  | Advanced | Manager | Senior Manager | Director |
| Job Description | - Individual contributor who supports operations in completing the daily tasks.- Transactional roles within the services provided | - Individual contributor who supports operations in completing the daily tasks. - Transactional roles within the services provided | - Provides operational or technical support at a specialist level. - Section leadership; technical reference point | - Manages a team/provides administrative or technical support at a Teamleader level. - Process Leadership & act as escalation reference point. | - First line manager that directs the activities of a small staff ofprofessionals and support staff. - Operations leadership, Next level escalation and Overall Supervision. | - Have a wide range of leadership responsibilities |
| Knowledge level | - Beginner level and possess knowledge for completing the tasksassigned. | - Experienced and possess knowledge for completing the tasks assigned | - Individuals are highly proficient in a broad range of activities related totheir job. - Considered in the department as the "knowledge base". | - Individuals are highly proficient in a broad range of activities related totheir job. - Point person to resolve issues elevated by support personnel. - Incumbent continue to the development of process and procedures. | - May also be a level above a supervisor within high volumeadministrative / production environments | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under close direction of senior personnel in the functional area. | - Follow the manuals and process updates for completing the daily tasksassigned with expected level of quality and timelines. - Works under moderate supervision and may seek the advice of seniorpersonnel in the functional area. | - Individuals independently perform a wide range of complex dutiesunder general guidance from supervisors. - May act as lead, SME or mentor to more junior technical oradministrative support personnel | - Works as Team lead / SME and mentor to specialist and administrativesupport personnel. - Monitor the performance of specialist /specialty and admin level. - Performing wide range of complex duties under general guidance fromsupervisors. | - Managers at this level may regularly apply expertise in day-to-dayactivities with their acquired expert and knowledge.  | - Being accountable for overall project delivery and overseeing knowledge transfer to customer- Bringing innovative strategic insight and best practice- Applying relevant private and public sector knowledge including policy and political issues- Delivering results that meet or exceed customer expectations- Developing strong customer relationships with senior stakeholders |
| Experience | - Typically requires 0-1 years of general work experience | - Typically requires 1-2 years of related experience  | - Typically requires 3-4 years of related experience  | - Typically requires 4 years’ experience | - Will typically have acquired at least the 2 yrs. of Supervisory level orprofessional level experience before becoming a manager.- Typically requires 5 years of professional experience | - Typically have over 10 years’ experience |

Implementation - Role Definitions

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Entry Level | Intermediate  | Advanced | Manager | Senior Manager | Director |
| Job Description | - Individual contributor who supports operations in completing the daily tasks. | - Individual contributor who supports operations in completing the daily tasks. | - Provides operational or technical support at a specialist level. - Section leadership; technical reference point | - Manages the execution of business process improvements. Selects, tailors and implements business process improvement methods and tools | - Develops organisational policies, standards, and guidelines for business process improvement which allow the organisation to quickly improve and implement business processes to meet business requirements. | - Directs the creation and review of a cross-functional, enterprise-wide approach and culture for embracing business process management and improvement. |
| Knowledge level | - Have good analytical and communication skills | - Have knowledge of a function, capability and/or industry- Have strong analytical skills, along with excellent verbal, written and presentation skills  | - Have specialised knowledge of a function, capability and/or industry | - Have deep expertise in at least one function, capability and/or industry | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  | - Acknowledged experts in at least one function, capability and/or industry- Extensive experience of leading major and/or complex projects  |
| Complexity of Work | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | Analyses and designs business processes; identifies alternative solutions to exploit new technologies and automation. | Sets direction and leads in the introduction and use of techniques, methodologies and tools, to meet overall business requirements, ensuring consistency across all user groups. Leads and plans business process improvement activities to analyse business processes; identify alternative solutions, assess feasibility, and recommend solutions which exploit new technologies and automation. | - Drives the identification, evaluation and adoption of technologies to transform organisational agility; customer and user experience; improve supply chains and exploit business opportunities. |
| Experience | - Typically requires 0-1 years of general work experience | - Typically requires 1-2 years of related experience  | - Typically requires 3-4 years of related experience  | - Typically requires5 years’ experience | - Will typically have acquired at least the 2 yrs. of Supervisory level orprofessional level experience before becoming a manager.- Typically requires 5 years of professional experience | - Typically have over 10 years’ experience |

Additional Roles - Lot 1 & Lot 2

|  |  |
| --- | --- |
| IT/Technical Support | Quality |
| Application support | Quality Analyst |
| Operations support | Quality Team Leader |
| Process support | Quality Manager |
| Software support | Director of Quality |
| Support manager |  |
| IT support |  |
| Product support |  |
| IT support manager |  |
| Cloud Architect |  |
| Cloud Consultant |  |
| Cloud Product and Project Manager |  |
| Cloud Services Developer |  |
| Cloud Software and Network Engineer |  |
| Cloud System Administrator |  |
| Cloud System Engineer |  |
| Computer and Information Research Scientist |  |
| Computer and Information Systems Manager |  |
| Computer Network Architect |  |
| Computer Systems Analyst |  |
| Computer Systems Manager |  |
| IT Analyst |  |
| IT Coordinator |  |
| Network Administrator |  |
| Network Architect |  |
| Network and Computer Systems Administrator |  |
| Network Engineer |  |
| Network Systems Administrator |  |
| Senior Network Architect |  |
| Senior Network Engineer |  |
| Senior Network System Administrator |  |
| Telecommunications Specialist |  |
| Customer Support Administrator |  |
| Customer Support Specialist |  |
| Desktop Support Manager |  |
| Desktop Support Specialist |  |
| Help Desk Specialist |  |
| Help Desk Technician |  |
| IT Support Manager |  |
| IT Support Specialist |  |
| IT Systems Administrator |  |
| Senior Support Specialist |  |
| Senior System Administrator |  |
| Support Specialist |  |
| Systems Administrator |  |
| Technical Specialist |  |
| Technical Support Engineer |  |
| Technical Support Specialist |  |
| Data Centre Support Specialist |  |
| Data Quality Manager |  |
| Database Administrator |  |
| Senior Database Administrator |  |
| Application Support Analyst |  |
| Senior System Analyst |  |
| Systems Analyst |  |
| Systems Designer |  |
| Information Security |  |
| Security Specialist |  |
| Senior Security Specialist |  |
| Application Developer |  |
| Applications Engineer |  |
| Associate Developer |  |
| Computer Programmer |  |
| Developer |  |
| Java Developer |  |
| Junior Software Engineer |  |
| .NET Developer |  |
| Programmer  |  |
| Programmer Analyst |  |
| Senior Applications Engineer |  |
| Senior Programmer |  |
| Senior Programmer Analyst |  |
| Senior Software Engineer |  |
| Senior System Architect |  |
| Senior System Designer |  |
| Senior Systems Software Engineer |  |
| Software Architect |  |
| Software Developer |  |
| Software Engineer |  |
| Software Quality Assurance Analyst |  |
| System Architect |  |
| Systems Software Engineer |  |