



Crown  
Commercial  
Service



# **Corporate Software Solutions**

## **Customer User Guidance**

### **Framework Agreement (RM1042)**

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Note: To access further information, please find associated material located in the documents tab on our agreement website [here](#).

## **1. PURPOSE OF THIS DOCUMENT**

- 1.1. This user guide is intended to provide customers with:
- 1.2. Guidance on how to utilise and access the Corporate Software Solutions agreement;
- 1.3. Sets out actions that customers are required to take in order to enter into call-off agreements under the framework;
- 1.4. Crown Commercial Service (CCS), North East Purchasing Organisation (NEPO), Yorkshire Purchasing Organisation (YPO), Central Buying Consortium (CBC) and Eastern Shires Purchasing Organisation (ESPO) will provide customers with procurement advice and guidance.

## **2. COLLABORATION WITH PRO5**

- 2.1. This agreement is the result of collaborative work between the Crown Commercial Service and Pro5. It had extensive customer input throughout and allows customers to procure specialist systems and related services from suppliers who have demonstrated the skills and attitudes required to deliver public sector ICT strategies.
- 2.2. Pro5 is a collaborative procurement hub made up of NEPO, YPO, CBC and ESPO who are public sector consortia governed by local authorities. Further information on the role of Pro5 can be found at <http://www.pro5.org/>

## **3. CONTRACT SCOPE**

- 3.1. Crown Commercial Service is an executive agency of the Cabinet Office, with a mandate to provide procurement savings for the whole UK Public Sector and deliver centralised procurement for Central Government Departments.

Corporate Software Solutions is a UK wide agreement available to any eligible UK public sector organisation as well as charities/third party organisations acting on behalf of customers. It can be used to procure ICT services both above and below the OJEU threshold.

- 3.2. Customers can procure a wide range of enterprise business applications and associated services.
- 3.3. The full specifications, which provide information on exactly what is covered within each Lot, can be found here:

<https://online.contractsfinder.businesslink.gov.uk/Common/View%20Notice.aspx?site=1000&lang=en&noticeid=1385301&fs=true>

- 3.4. If you require assistance in identifying the correct Lot for your requirement please contact the category team via [css@crowncommercial.gov.uk](mailto:css@crowncommercial.gov.uk) with details of what you are looking to procure and indicative timescales.

#### **4. Lot Structure**

The scope of the framework covers a wide variety of requirements categorised into the following seven Lots:

##### **Lot 1 - Enterprise Resource Planning (ERP) Software Solutions**

ERP systems are integrated computer-based systems used to manage internal and external resources including tangible assets, financial resources and materials, and human resources. Their purpose is to facilitate the flow of information between all business functions inside the boundaries of the organization and manage the connections to outside stakeholders. Built on a centralised database and normally utilising a common computing platform, ERP systems consolidate all business operations into a uniform and enterprise wide system environment.

##### **Lot 2 - Finance IT Software Solutions**

The provision of finance application software provides finance application solutions or the amendment of existing solutions which includes solution identification, design, development, implementation, data take-on, migration, integration and security; user training, maintenance and support. It also covers the prototyping, configuring or tailoring of existing products and includes some goods and services as part of a wider solution.

##### **Lot 3 - Human Resources (HR) and Payroll Software Solutions**

Provides HR & payroll application solutions or the amendment of existing solutions which will include solution identification, design, development, implementation, data take-on, migration, management of internal resources, integration and security; user training, maintenance and support. It also covers the prototyping, configuring or tailoring of existing products and include some goods and services as part of a wider solution.

##### **Lot 4 - Customer Relationship Management (CRM) Solutions**

Provides customer relationship management and case management solutions which includes solution identification, design, development, implementation, data take-on, migration, integration and security; user training, maintenance and support or managed service all necessary to better manage relationships with customers. It also covers the prototyping, configuring or tailoring of existing products and includes some goods and services as part of a wider solution, including the provision of operational services.

##### **Lot 5 - Enterprise Content Management (ECM) Software Solutions**

Provides Enterprise Content Management (ECM) or Document and Records Management (EDRM) solutions which includes solution identification, design, development, implementation, organising, storing, data take-on, migration, integration and security; user training, maintenance and support as part of a wider solution that relates to customer processes. It also covers the prototyping, configuring or tailoring of existing products and includes some goods and services as part of a wider solution required throughout the lifecycle of the content. The scope of this Lot covers the implementation of document life cycle solutions.

## **Lot 6 - Data Management and Reporting Systems (DMRS) Software Solutions**

Provides Information Management application solutions or amendment of existing solutions which includes solution identification, design, development, implementation, data take-on, migration, processing, integration and security; user training, maintenance and support. It also covers the prototyping, configuring or tailoring of existing products and include some goods and services as part of a wider solution. This Lot also covers data management services which include data interfacing, data integration, data governance, data analysis, data architecture, data modelling, data management, data archiving/de-duplication, data security, data mining, data quality management, master data management, data warehousing, business intelligence, content management and meta data management to efficiently process large quantities of data within a specified time limit.

### **4.7 Lot 7 - Mobile Application Solutions**

Services in this Lot include mobile solution identification, design, deployment, development, testing, implementation, data take-on, migration, integration and security; user training, maintenance and solution hosting and support for a range of deployments in delivering customers' mobile application requirements to a variety of mobile devices.

This Lot is only for the development of mobile applications on various platforms and will cover development of complete mobile applications through to mobile interfaces for existing applications.

## 5. BENEFITS OF USING THE AGREEMENT

This agreement provides customers with a route to market for line of business software applications and related services. Customers do not need to publish their requirements by OJEU or pre-qualify suppliers in order to procure services from them.

Benefits include:

- 5.1 Reduced timescales – Customers do not need to run a full OJEU procurement as this has already been undertaken by us at framework level. Customers need to identify their requirements, present these to the market and award a contract.  
  
Suppliers will also benefit from minimised duplication of effort, as they only need to complete one OJEU process.
- 5.2 Ease of use – The agreement is simple to use, with expert commercial advice available from the Crown Commercial Service and Pro5. Customers place call-off contracts via further competition, where a customer runs a Request for Quotation providing suppliers with the details of their requirement, and each supplier submits a priced solution against this requirement.
- 5.3 Choice of suppliers – The agreement offers an excellent choice of suppliers - 23 in total and establishes strategic relationships with key suppliers to the public sector to gain better value for money, take out cost and to align suppliers with Government/ organisational priorities. Early pre-market engagement will help increase choice in supplier.
- 5.4 Legality – The agreement is fully compliant with EU regulations, as EU procurement rules introduced in 2006 specifically recognise framework agreements as a legitimate route to market. This reduces procurement risk for customers and reduces bureaucracy in the procurement process.
- 5.5 Assured supplier standards – Appointed suppliers are 'pre-qualified' as to their general suitability. This means when buying services customers are assured that they can meet specified requirements for supplying goods and services. In addition Supplier Relationship Management will be undertaken by CCS and Pro5.
- 5.6 Pre-defined terms and conditions – Terms and Conditions of contract have been established and all suppliers have signed and accepted this agreement and terms and conditions of call-off. Only comments in square brackets [ ] can be amended to be agreed between the supplier and customer by populating or deleting.

## 6. WHO CAN USE THE AGREEMENT

- 6.1 The Framework is open to all public sector and non-profit making third sector organisations within the United Kingdom. A complete list of eligible customers is included the OJEU Contract Notice which can be found at;

<https://online.contractsfinder.businesslink.gov.uk/Common/View%20Notice.aspx?site=1000&lang=en&noticeid=1385301&fs=true>

and summarised below:

- Local Government
- Education
- Blue Light Services
- Devolved Administrations
- Health i.e. NHS, NHS Trusts
- Central Government Departments and
- Voluntary and Community Organisations i.e. Charities and Not-for-profit (NPO's)

## 7. CONTRACT DURATION AND VALUE

- 7.1 The agreement will cover the period from 10/10/2014 to 9/10/2016 with two options to extend for an additional subsequent twelve (12) months (2+1+1).
- 7.2 Customers can enter into call-off contracts for periods of up to five (5) years. The maximum call-off permitted is five (5) years with the option to build in flexibility with core years plus extensions e.g. 3+1+1.
- 7.3 The total spend through the lifetime of this agreement as described in the OJEU notice is estimated between £750 million and £950 million.

## 8. PRICING

- 8.1 Suppliers have provided pricing for;
- 8.1.1 Their service charges (day rates) linked to SFIA (Skills Framework for the Information Age).
- 8.1.2 The day rates provided are only a baseline and customers must run a further competition to obtain prices specific to their requirement.
- 8.1.3 Pricing for all Lots are available directly from us on request or via the eSourcing tool when running a further competition.

## 9. HOW TO USE THE AGREEMENT

- 9.1 Customers must conduct further competitions in accordance with the procedure described in this guidance and the requirements of the regulations.
- 9.2 All customers must undertake the following steps:
- 9.2.1 Review the guidance documentation and specification;
- 9.2.2 Determine their requirement; and
- 9.2.3 Determine the best route for your procurement, and action this in line with the parameters outlined in the sections below.
- 9.3 You are able to use Crown Commercial Service tools to run further competitions for no charge if you wish but are not required to. You may alternatively choose to use your own systems to run competitions under the framework.

## 10. PRE MARKET ENGAGEMENT

- 10.1 Pre-market engagement (i.e. engaging with the framework supply base prior to issuing further competition documentation) is permitted under the agreement. Indeed this activity is welcomed by the supply base and can be a useful tool for customers to determine the best procurement route. When running a further competition, pre-market engagement is useful to find out exactly what needs to be included in the documentation and specification to obtain the best quotations from the suppliers, and also as a useful tool to ask any questions that will help structure a further competition.
- 10.2 If engaging with the market prior to awarding a contract, you should ensure that you complete this exercise on a fair, open and transparent basis (i.e. allow the opportunity for engagement with all suppliers on the framework, and provide all suppliers with the same information during the pre-market engagement exercise.)
- 10.3 To engage with the market, you can either email the suppliers directly using the contact details available on the Supplier contact details document, or utilise the free Crown Commercial Service eSourcing tool.

## 11. TIMESCALES

- 11.1 Allowing sufficient time for suppliers to consider and respond to your further competition is imperative. A suggested timetable for your further competition follows; (Please note this is a guide and should be amended to reflect your requirement.)
- 11.2 Plan sufficient time for bidders to consider your response. Should further clarifications be required on responses you may wish to extend your closing date, particularly during peak times i.e. the quarter period before April or Christmas Public Holidays.
- 11.4 It is recommended that you include a ten-day Standstill period between notification of intention to award and formal award of call-off contract.

## 12. AWARD CRITERIA

- 12.1 The award criteria and guidance are consistent for all Lots.
- 12.2 On all documentation you will need to include the framework reference of RM1042.
- 12.3 When running a further competition, customers should award on the basis of the most economically advantageous tender (MEAT) and must provide suppliers with information explaining the methodology behind the evaluation, including the criteria and the weightings that will be applied to each assessment.
- 12.4 We **suggest** that the criteria listed below are used in assessing Suppliers' tenders. You are able to amend the criteria and weightings to suit your needs but should ensure that they equal 100%.
- 12.5 Examples of sub criteria within price and quality are also shown and customers may opt to include when drafting their further competition.



Criteria Number	Suggested Criteria	Percentage Weightings (or rank order of importance where applicable) - to be set by the customer conducting the further competition
A	Quality	40-90%
B	Cost effectiveness	0-10%
C	Technical merit	0-20%
D	Technical assistance	5-20%
E	After sales service	0-10%
F	Price	40-90%
G	Aesthetic and functional characteristics	5-10%
H	Running costs	0-10%
I	Environmental characteristics	0-10%
J	Delivery date and delivery period	0-10%

- 12.6 There is no mandatory requirement to use all or any of the criteria. However customers must make this clear in their further competition.
- 12.7 The procurement process adopted at tender stage was based upon the Open tendering procedure as detailed in the European Communities Combined Directive (2004/18/EC).

#### **DEVELOPING YOUR MARKET PROPOSITION**

- 12.8 Customers must provide the suppliers with a minimum set of information that can be used to help propose solutions and price against requirements effectively.
- 12.9 If customers require support in developing their market proposition, this can be sourced from Crown Commercial Service or a private sector supplier.

#### **13. FINALISING THE CALL-OFF**

- 13.1 Once a decision to award has been made, it is advised that for further competitions above the OJEU threshold, customers observe a ten day Standstill period. This does not specifically apply to the award of a contract under a framework but is good practice. If doing this, Customers should send out an intention to award letter to all suppliers that submitted a tender. **A template debrief letter is available.**
- 13.2 Once the ten day standstill period is complete, without a challenge, customers must instruct the supplier. This should be done by completing and sending the letter of appointment and terms and conditions, **again templates are available.**

## 14. TERMS AND CONDITIONS

- 14.1 The model call-off contract has been designed to meet the specific requirements of a software application or related services. These terms and conditions can be found on our website [here](#) with the model order form, and **must** be utilised for all call-off contracts entered into under this framework agreement.
- 14.2 Minor amendments to the terms and conditions can be made and proposed as part of a further competition. A variation form is included in the terms and conditions document.

## 15. KEY TIPS WHEN MANAGING A FURTHER COMPETITION

- 15.1 Before issuing the further competition documentation
  - 15.1.1 Review the specification to establish that the requirement is within scope of this agreement.
  - 15.1.2 Develop the statement of requirements that suit individual special terms, e.g. specific to the particular services that will be provided to meet a particular requirement.
  - 15.1.3 Hold discussions with the suppliers, where appropriate, in order for them to fully understand your requirement.
  - 15.1.4 Specify realistic levels of service and understand your responsibilities throughout.
  - 15.1.5 Vary the weighting of the criteria to suit local priorities
  - 15.1.6 Use output-based specifications to encourage innovation.
  - 15.1.7 Involve key individuals and stakeholders as appropriate in the process.
- 15.2 Develop the invitation to tender documentation and provide suppliers with upfront information and criteria explaining how the tenders will be evaluated.

### ***DURING THE FURTHER COMPETITION***

- 15.2.1 Invite all suppliers that feature within the appropriate Lot.
- 15.2.2 Allow sufficient time for a full and professionally prepared response from suppliers, ideally 4 to 6 weeks depending on the level of complexity.
- 15.2.3 Treat all participating suppliers fairly and equally throughout the entire competition process.
- 15.2.4 Issue timely clarifications to questions and publish them to all participants.

### ***AWARDING THE FURTHER COMPETITION***

- 15.2.5 Award to the supplier offering best value for money based on the award criteria and qualitative and commercial scores at further competition
- 15.3 Don't:**
- 15.3.1 Over specify levels of service as this may give poor value for money.
  - 15.3.2 Aim the specification at a particular supplier or their product range.
  - 15.3.3 Arbitrarily choose a reduced number of suppliers to receive tenders.
  - 15.3.4 Create specifications that are unfairly restrictive.
  - 15.3.5 Treat any supplier differently from the others.

## 16. FEEDBACK AND CONTACT DETAILS

16.1 If you have any queries, or wish to discuss your requirement or the agreement in further detail, please get in touch:

Crown Commercial Service

E: [css@crowncommercial.gov.uk](mailto:css@crowncommercial.gov.uk)

Tel: 0345 410 2222

YPO

E: [IT.Services@ypo.co.uk](mailto:IT.Services@ypo.co.uk)

Ian Summerscales

T: 01924 885907

Richard Ulliyott

T: 01924 836986

ESPO

E: [ICT@espo.org](mailto:ICT@espo.org)

Angela Course

T: 01162 657946

CBC

W: <http://www3.hants.gov.uk/cbc>

E: [Procurement.Support@Hants.Gov.uk](mailto:Procurement.Support@Hants.Gov.uk)

NEPO

Stephen Roberts

E: [enquiries@nepo.org](mailto:enquiries@nepo.org)

T: 0191 261 39 29

16.2 If you would like to provide feedback relating to this agreement, please get in touch with the Crown Commercial Service using the details provided above.