

Public Sector Managed Print and Digital Solutions

Customer Guidance Notes

Reference: RM3785
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End date: 27/12/2020
OJEU contract notice: 2016/S 025-040335

This guidance provides an overview of the framework and how best to use it.

If you need specialised procurement, legal or other professional advice to help you use the agreement, you are advised to seek advice from the appropriate specialist procurement or legal personnel within your own organisation.

How to order through this framework agreement (the call-off process)

Lot 1: Direct award (single framework supplier) – To access this lot create your specification/statement of requirements, populate your call-off contract and engage with the supplier directly.

Lot 1 pricing model comprises:

Printed Product Cost	Plus	Service Charge
<p>This covers the component parts required to produce the goods. This is likely to include, (but is not limited to):</p> <ul style="list-style-type: none">• Pre-production services,• Print production• Paper* <p>There are hourly rate cards for pre-production services (typesetting, page layout etc.) and also for storage fulfilment and distribution.</p>		<p>There will be a service cost applied by the supplier for servicing your requirements.</p> <p>There are three levels of service you can choose from (see table below) and each attracts a percentage charge. (This will be a percentage of the amount invoiced to you by the supplier on a monthly basis).</p>

* A paper pricing matrix, detailing prices for a variety of commonly used papers, is available.

Gainshare

You may like to consider a gainshare as part of your pricing model. The percentage should be agreed between you and the supplier and included in your call-off contract.

Pricing model for Command and House Papers

The Command and House Papers Service has a comprehensive set of rate cards detailing the various charges associated with this service. The rate cards reflect the price you will be charged for services.

How to access the rate cards:

Please contact us via info@crowncommercial.gov.uk, advising which lot you are interested in and a brief scope of the services you require.

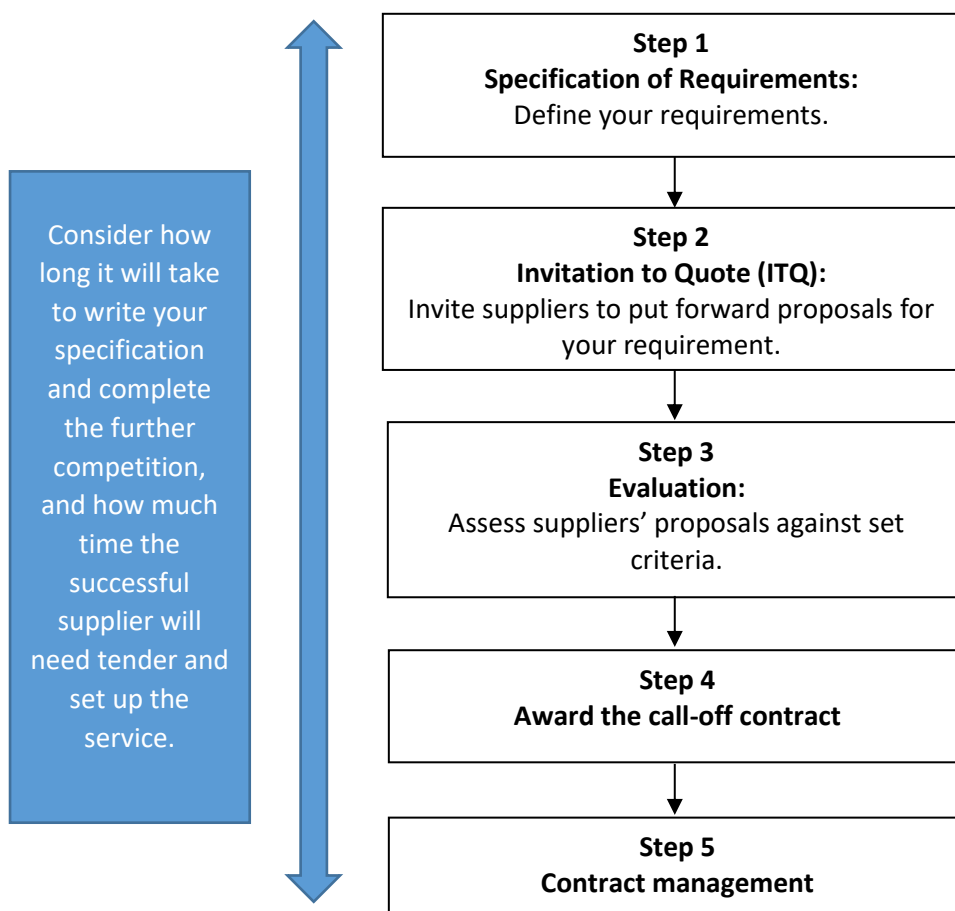
Lot 1 Service Options:

The table below outlines the three service options available.

Service option	Description	Includes	Excludes
1	Customer service centre	Dedicated buyers/ advisors who will service your requirements from defining the requirements and solutions, through to project conception and delivery. You may place orders via web, email or phone.	Onsite staff. Solution management (i.e. project manager, technical manager), which is in product costs.
2	In house account management team Based at customer premises	Bespoke account management team who are embedded into your organisation to fulfil the role of the print buyer/ team. This team will be based at your site. This team will provide a fully managed end-to-end service from defining the requirements and solutions, through to project conception and delivery.	Solution management (i.e. project manager, technical manager), which is included in product costs.
3	Off-site account management team Based at supplier's premises	Bespoke account management team who fulfil the role of the print buyer/team for you. This team will be based at the supplier's site. This team will provide a fully managed end-to-end service for you, from defining the requirements and solutions, through to project conception and delivery.	Solution management (i.e. project manager, technical manager), which is in product costs.

Lot 2: Further competition (Six framework suppliers) - To access this lot you will need to run a further competition before you can place an order (call-off). This process allows you to further refine your requirement, whilst retaining the benefits offered under the framework agreement.

The diagram below sets out the process to follow when conducting your further competition:



Step 1: Specification of Requirements

A specification of requirements document sets out a full statement of what is required and forms part of the documentation, which is sent to suppliers when inviting them to quote.

When developing your specification of requirements, you should consider the following areas and include this information within the final document:

- Statement of requirements – what goods / services you want to buy
- Pricing
- Competition timescales
- Evaluation criteria and weightings
- Evaluation process
- Additional terms and conditions (optional)

The framework agreement goods and services specification can be used as a guide to the areas you should cover. A “tips for creating your print specification” document is also available via the documents tab on the website.

Pricing

Lot 2 pricing model comprises:

<p>Printed Product Cost</p> <p>This covers the component parts required to produce the goods. This is likely to include, (but is not limited to):</p> <ul style="list-style-type: none">• Pre-production services,• Print production• Paper. <p>There are hourly rate cards for pre-production services (typesetting, page layout etc.) and also for storage fulfilment and distribution - these show the maximum rates you will pay for these services through lot 2 of the framework.</p>	Plus	<p>Service Charge</p> <p>There will be a service cost applied by the supplier for servicing your requirements that will be capped at a maximum of 15 %.</p> <p>The service charge will be determined by the further competition based on your requirements.</p>
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Gainshare

You may like to consider a gainshare as part of your pricing model. The percentage should be agreed between you and the supplier and included in your call-off contract.

Low volume, ad hoc purchases

There is a transactional print matrix for forms, letterheads, business cards, posters and letterheads in various quantities, which you can use for low volume, ad hoc purchases.

How to access the rate cards

Please contact us via info@crownccommercial.gov.uk, advising which lot you are interested in and a brief scope of the services you require.

Competition timescales

Your project timescales should allow sufficient time for potential suppliers to respond. A reasonable period is 3-6 weeks, with 3 weeks as the minimum you should allow. The timing should allow a period for clarification questions, where suppliers can ask questions relating to the invitation to quote.

The table below is an example of the stages for which outline timescales should be provided to Suppliers:

Invitation to quote (ITQ) published	[insert date]
Clarification question and answer period	[insert start and end dates]
Response deadline	[insert date]
Evaluation	[insert start and end dates]
Suppliers notified of outcome	[insert date]
Contract awarded (after standstill period)	[insert date]

Evaluation criteria

You will need to develop evaluation criteria to evaluate the supplier responses to your further competition.

All suppliers on this framework agreement have already been evaluated based upon offering best value for money at a high level. Your evaluation should focus on a supplier's capability and cost in relation to your specific requirement.

Questions such as financial standing, business continuity and previous experience have already been evaluated at agreement level and should not be re-assessed.

The evaluation weightings you will use should be issued as part of the ITQ documentation and follow the criteria set out below.

Criteria number	Criteria	Percentage weightings (or rank order of importance where applicable) - to be set by you when conducting your further competition
A	Quality (including <ul style="list-style-type: none">• Technical merit and assistance,• Helpdesk and after sales service,• Aesthetic and functional characteristics,• Environmental characteristics, Delivery date and delivery period)	30%-70%
B	Price	30%-70%

You must identify your quality criteria for the evaluation. Think about the key quality criteria you want to assess and apportion it the highest weighting. It is up to you to decide the overall criteria using the ranges provided. The total percentage of quality and price must be 100%.

The questions you require suppliers to respond to should be forward looking and not based on previous experience (e.g. "how do you propose to deliver..." instead of "how have you delivered...") and must allow for an objective assessment. Your statement of requirements/specification should be used to develop the questions in the ITQ.

You must also describe how the price evaluation will be conducted. For example, you may wish to award the full price weighting to the lowest-priced provider and the subsequent bids could receive a decreased score based on the differential in their pricing. It is up to you to determine how the price assessment will be conducted but it must be made clear to suppliers in the documentation.

Remember to be proportionate with the size and complexity of your requirements. If you have a non-complex or low value requirement consider the amount of time the suppliers will have to spend preparing their submission, and the amount of time you will need to assess the responses.

Evaluation process

In preparation for the evaluation stage, you should document the process you intend to follow (i.e. who will undertake the evaluation, when this will be carried out, how the ultimate decision to award a call off agreement will be made). This will ensure there is a robust audit trail in place, helping to secure fairness and transparency and reducing the risk of challenge.

The evaluation procedure must be defined prior to the issue of the ITQ and should include a documented record of:

1. The criteria against which you will assess the responses.
2. The scores that you will apply to assess how far compliance with each criteria has been achieved.
3. Where appropriate, the weighting methodology that will ensure there is a balance in overall scores that reflects the relative importance of each criteria you are using.
4. The overall basis for determining (based on the criteria, scores and weighting) which supplier response is the most economically advantageous offering. Normally this is the response with the highest overall mark.
5. An indicative timetable for each stage in the further competition process.

It is important to ensure that at all stages of the process you can demonstrate it is being conducted in a fair and transparent manner to all suppliers on the lot(s) you wish to use.

Additional terms and conditions

You can include additional terms and conditions in the call-off contract, if required. Special terms may be used to clarify or define existing terms. The application of special terms is subject to the following:

- Special terms may be proposed only by you (not the supplier)
- Agreement to special terms may be sought only under the further competition procedure
- Special terms must not be used to substantially alter the framework terms and conditions
- Special terms must be notified in advance to all suppliers involved in the further competition
- Additional terms must be used sparingly as a mechanism for supplementing or refining aspects of the call off contract. They must not seek to redefine the underlying commercial parameters of the contractual relationship.

You may wish to seek professional advice before considering the use of additional terms.

Note: Changes to the standard terms and conditions may lead to increased costs and lengthen the timescale for the further competition, as suppliers will need to assess the implications of the changes. You should therefore only use special terms that are specific to requirements when they are essential.

Step 2: Invitation to Quote (ITQ)

You will now have all your documentation ready to issue an Invitation to Quote. This begins the formal competitive stage of the further competition procedure.

To ensure compliance with current procurement regulations, you must issue the ITQ to ALL capable suppliers within the lot.

Details of the procurement process, timeline, award criteria and evaluation procedure must be published to all capable suppliers at the same time the ITQ is published. The call-off contract should be included when you issue your ITQ documentation. If you think it will be helpful, provide background material to help suppliers to understand the requirements in further detail.

Your ITQ will ask suppliers to provide a response in which they demonstrate how they intend to meet your requirements as set out in the specification of requirements document. You will use this information to evaluate which supplier has the most economically advantageous offering and should be awarded a call-off contract.

During the clarification period, if suppliers ask any questions you must make sure that you treat all potential suppliers fairly and equally without discrimination. You must anonymise any questions received, making sure that you do not reveal the identity of the originator, or reveal any potentially commercially sensitive information relating to the originator. You must provide an appropriate response and issue both the question and answer to all participating suppliers, releasing this information to all suppliers at the same time, to ensure fairness and transparency. You may also consider a face-to-face briefing for the suppliers.

Proposals must remain confidential until the response deadline has expired.

Sensitive or confidential information

If your requirement includes sensitive or confidential information, you may wish to protect the information from being released into the public domain. The confidentiality clauses in place within the call-off documentation do not apply until an agreement is signed with the successful supplier.

Therefore, you can choose to include an additional layer of confidentiality during the further competition phase, by using a Non-Disclosure Agreement (NDA).

You will need to put your own NDA or confidentiality agreement in place, so speak to your procurement or commercial team as they may already have a template.

If you issue an NDA, we recommend that all competing suppliers sign and return it before you issue any further documentation.

Note:

The further competition ordering procedure must not be used to establish a 'mini framework arrangement' that sits beneath the overarching Managed Print and Digital Solutions agreement (i.e. you may not use a further competition to set up a shortlist of appointed suppliers who you might then approach directly for ad hoc requirements).

All information provided by suppliers in their responses must be kept in a secure, locked place, with access strictly controlled and monitored. Our eSourcing tool offers this functionality. For information on how to do this please refer to the user guidance.

It is recommended that, as a minimum, a team of three evaluators should review the responses to support a fair consensus. Responses should not be discussed outside of the evaluation team and pricing information should be treated as commercially sensitive.

You must ensure that you maintain a fully documented audit trail of the results and final award decision, which will be useful for providing feedback to unsuccessful suppliers.

Step 4: Award call-off contract

Following completion of the evaluation process, and any required internal approval, you can now notify all participating suppliers of the outcome of the further competition and the intention to award a call-off contract.

You should provide written feedback to all participating suppliers, including a full breakdown of their scores against the stated evaluation criteria.

You should consider allowing a standstill period (of 10 days) before awarding the agreement to allow suppliers to request feedback, where necessary.

You can now award a call-off contract to the successful supplier.

Following the award of any call-off contract please notify us with the estimated contract value and details of the start and end date by emailing info@crownccommercial.gov.uk.

Step 5: Contract management

Once the supplier has started to provide the services you should manage them to ensure they are performing to meet your requirements.

We can act as an escalation point to support you if you encounter any issues you are not able to resolve or if you require advice or guidance.

Help and advice

If you would like help deciding which service or buying option will best meet your specific needs please get in touch with our category experts:

Email: info@crownccommercial.gov.uk

Call: 0345 410 2222

You can also learn more about our range of commercial deals and latest offers online:

Web: www.gov.uk/ccs

Twitter: @gov_procurement

LinkedIn: Crown Commercial Service