



Crown
Commercial
Service

Invitation to tender Attachment 4b – Framework Schedule 2 – Services - Specification

Management Consultancy Framework Two (MCF2)

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1. Introduction

- 1.1. We are seeking to establish a Framework Agreement for the supply of management consultancy, which will be available through 4 Lots.

Lot	Lot name
Lot 1	Business Consultancy Services
Lot 2	Procurement, Supply Chain and Commercial Consultancy Services
Lot 3	Complex and Transformation Consultancy Services
Lot 4	Strategic Consultancy Services

- 1.2. The purpose of this document is to provide a description of the Services that the Bidder shall be required to deliver to Buyers under the Framework Agreement.
- 1.3. The Procurement has been advertised by publishing a contract notice in the OJEU advertising the open procedure under the Public Contracts Regulations 2015.
- 1.4. We published a Prior Information Notice (PIN) 2017/S 168-345488 on 2nd September 2017 in the OJEU.

2. Specification

2.1. LOT 1 BUSINESS CONSULTANCY SERVICES

2.1.1. The Supplier shall be able to offer advice and/or delivery for management consultancy services for one or more Service Lines listed below.

2.1.2. The assignments may be multidiscipline.

Service Line	Description
1	Business case development which includes options analysis, resourcing, affordability and risks including mitigations and dependencies.
2	Capability development, which focuses on a team and or organisation development through a range of strategies or activities that aim to achieve current business goals.
3	Application of best practice tools and techniques, (such as business process reengineering or lean thinking), to achieve a step change in performance and or to access efficiency savings.
4	Appraising business structures, business architecture, operating models and business performance measurement.
5	Business and disaster recovery planning advice in the unexpected event of an outage and how a Customer can become operational in a minimum timeframe.
6	Business policy/strategy appraisal, development and formulation to improve the organisations success in the long term.
7	Business sourcing strategies, which includes:
7a	Outsourcing.
7b	Shared services.
8	Change management, which includes:
8a	Structural reviews.
8b	Organisational diagnosis.
8c	Role design.
8d	Re-organisation.
8e	Organisation redesign.
8f	Planning.
8g	Process.
8h	Stakeholder engagement and management.
8i	Training.
8j	Issues identification and resolution.
8k	Rationalisation and efficiency, to include transformation solutions.
9	Conducting “value for money” (VfM) reviews, in support of policy and or strategy development.
10	Continuity planning – the development of strategy which looks at the threats and risks facing the Customer and how to ensure that assets and personnel are protected and are able to operate in the event of a disaster.
11	Corporate planning development of strategies, milestones and desired outcomes for the Customer, along with progress review practices and change management policies.

12	Operational planning supporting a Customer to define actions to support their strategic objectives.
13	Development of change management policies, strategies and or programmes or projects. Implementation of change management plans including the managing programmes and projects utilising best proactive tools and techniques to ensure successful delivery of objectives.
14	Development or review of government policy and or objectives.
15	Forecasting, planning and development.
16	Workforce, human resources and benefits.
17	ICT, which includes:
17a	Development of vision and strategic brief.
17b	Analysis of current systems and problem and opportunity definition.
17c	Artificial intelligence.
17d	Options analysis.
17e	Conceptualisation, inception and viability studies.
17f	Technical analysis.
17g	Economic analysis.
17h	Operational analysis.
17i	Cost 'vs' benefit analysis.
17j	Recommendation of preferred solution.
17k	Requirements specification.
17l	Provide technical expertise to support ongoing ICT projects.
17m	Digital services strategy.
17n	Security and risk management planning.
18	Identification and development of new services, programmes and or initiatives.
19	Options appraisal which assess: <ul style="list-style-type: none"> • Desirability - the degree to which each option meets the strategic objectives and priorities of stakeholders. • Viability - the degree to which each option is financially viable and sustainable. • Feasibility - the degree to which each option can be implemented.
20	Policy, which includes:
20a	Strategic knowledge.
20b	Information management.
20c	Development.
20d	Advice.
20e	Review.
21	Project management, which includes:
21a	Managing the project scope.
21b	Project stakeholders.
21c	Project team.
21d	Project risks.
21e	Project schedule.
21f	Project budget.

21g	Project conflicts and benefits.
21h	Planning.
21i	Execution.
21j	Monitoring control and closure of a project.
22	Risk and opportunity management.
23	Sustainability and sustainable development policies and strategies.
24	Risk and compliance.
25	Sales and marketing.
26	General data protection regulation.
27	International / cross border.

2.2. LOT 2 PROCUREMENT, SUPPLY CHAIN AND COMMERCIAL CONSULTANCY SERVICES

2.2.1. The Supplier shall be able to offer advice and/or delivery for procurement, supply chain and commercial consultancy services for one or more of the Service Lines listed below.

2.2.2. The assignments will likely be multidiscipline.

Service Line	Description
1	Market analysis and research for services, goods and market testing.
2	Financial advice on projects, bidders or infrastructure finance.
3	In/out sourcing of customer services.
4	Procurement efficiencies and delivery of strategic sourcing, including innovative contractual arrangements.
5	Procurement methodologies and research, for example "7 step" and trending practices in the industry.
6	Outsourcing, management of procurement assignments with specific market or category expertise.
7	Category management, planning, deployment, methodology, and benchmarking reviews focusing on specific areas of spend. Make or Buy assessment for all indirect and direct spend categories.
8	Analysis of bids, tenders and spend, also procurement, supply chain, commercial and related business intelligence.
9	Procurement policy including UK and internationally.
10	Outsourcing of procurement or supply chain services.
11	Complex commercial procurement assignments, which may include strategic, operational and tactical procurement, also implementation of the contractual agreement as a programme.
12	Structuring of procurement and evaluation through to development and delivery of strategic sourcing.
13	Supplier relationship management, performance management.
14	Sourcing strategy under regulatory control UK and internationally.
15	Capital and operational expenditure/budget management of assets.
16	Ecommerce, procurement technologies related to complete end to end solutions.

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Attachment 4b

Version 1

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17	Stakeholder influencing, mapping, customer relationship development, procurement up selling, people and skills.
18	Request for information, request for quotation, and invitation to tender, pre-qualification, gate way reviews.
19	Off-shoring and on-shoring.
20	Options appraisal which assess: <ul style="list-style-type: none"> • Desirability - the degree to which each option meets the strategic objectives and priorities of stakeholders. • Viability - the degree to which each option is financially viable and sustainable. • Feasibility - the degree to which each option can be implemented.
21	Procurement process, which includes private finance initiative, public finance initiative, which includes:
21a	Assessing bidding proposals and contract negotiations.
21b	Assessing and developing project proposals.
21c	Complex transactions including planning, review, design and evaluation.
21d	Design and implementing commercial strategies and procedures.
21e	Design and implementing procurement, sourcing strategies and procedures.
21f	Preparing project documentation.
21g	Pricing models and benchmarking.
21h	Review and document.
21i	Stakeholder management (internal and external).
21j	Sustainability, corporate and social responsibility and ethics.
21k	Post award implementation (including refinancing advice).
22	Risk mitigation – the understanding of risks and implementation of strategies to mitigate and manage those risks.
23	Budget impacting savings and recognition – advice on the identification and successful delivery of savings, which impact the Customers budget.
24	Supplier performance management – advice on measuring, analysis and delivery of continuous improvement and management of the suppliers performance to drive efficiencies for the Customer.
25	Assignment, project, programme, portfolio reviews, analysis and recommendations.
26	Advice on outsourcing of procurement and supply chain resourcing.
27	Commercial/pricing models and strategies to ensure best value for the Customer.
28	Transactional procurement services which includes but are not limited to: purchase to pay (P2P) and related consultancy, purchase orders, contract management, automation, digitalisation or administering work.
29	Contract management: managing contract creation, execution and analysis to maximise operational and financial performance for customers, also reduction of financial risk. Improvement of contract performance, and ongoing continuous improvement. Contractual remedial support.
30	Risk, payment profiles, structures and accounting treatment.
31	Opportunities for cost reduction and commercial benefits.
32	Supply chain and logistics, which includes:
32a	Warehousing.

32b	Distribution.
32c	Demand forecasting.
32d	Inventory analysis.
32e	E-commerce.
32f	Enterprise resource planning systems.
32g	Network design and optimisation.
32h	Sales and operations planning.
32i	Technology and automation.

2.3. LOT 3 COMPLEX AND TRANSFORMATION CONSULTANCY SERVICES

2.3.1. The scope of this Lot will provide the flexibility for Customers to procure Services spanning multiple work streams and multiple Customers that will include the total life cycle of the programme/s or projects – ensuring continuity of provision from advice through to successful delivery. The assignments will likely be multidiscipline.

2.3.2. The Supplier shall be able to offer all of the Service Lines listed below and to be able to co-ordinated and deliver multi work stream assignments:

Service Line	Description
1	Change management, which includes:
1a	Structural reviews.
1b	Organisational diagnosis.
1c	Role design.
1d	Re-organisation.
1e	Organisation redesign.
1f	Planning.
1g	Process.
1h	Stakeholder engagement and management.
1i	Training.
1j	Issues identification and resolution.
1k	Rationalisation and efficiency, to include transformation solutions.
2	Complex programmes - advice on complex programmes which are politically sensitive and of high value. Areas may include:
2a	Planning.
2b	Design.
2c	Diagnostics.
2d	Review.
2e	Analytics.
2f	Stakeholder engagement, management and communications.

3	Portfolio management advice on the selection, segmentation, risk and return, reviews, prioritisation and control of the Customer's projects and programmes to ensure that the Customer strategic objectives are achieved whilst ensuring its financial viability.
4	Programme management – advice on the management of managing several related projects (complex and transformational), which may include areas such as; project coordination, transformation, benefits, stakeholder management and communications.
5	Risk and compliance.
6	Supplier side advisory services – the provision of advice, guidance and professional support focusing on the provision of high quality impartial and or functionally specific and or “expert” advice for the identification of innovative solutions and recommendations. The Customer may invite the involvement of a Supplier at an early stage within a project to formulate transformational policy and provide strategic advice, through the design and change management phases.
7	Supplier side programme delivery - provides the flexibility for Customers to procure a programme of work or project that will include the total life-cycle of the programme or project. For example this may take Customers from transformational policy and strategic advice through the design phase, change management and implementation aspect to enable hand over to operating service delivery providers.
8	Transformation management - related to significant internal organisational change including changes to structures, corporate systems or processes or external changes including functional redesign, delivery systems or means of engagement with stakeholders.
9	Asset management.
10	Performance improvement.

2.4. LOT 4 STRATEGIC CONSULTANCY SERVICES

2.4.1. The Supplier shall provide strategic advice to senior stakeholders which could include ministers, permanent secretaries and other senior civil/public servants. The assignments will likely be multidiscipline.

2.4.2. The Supplier shall be able to offer all of the Service Lines listed below:

Service Line	Description
1	Joint ventures and strategic alliances, which includes:
1a	Viability.
1b	Feasibility.
1c	Research including analytics.
1d	Stakeholder engagement.
1e	Document review.
1f	Market overview.
2	Advice on mergers, acquisitions and disposals, which includes:
2a	Viability.

2b	Feasibility.
2c	Research, including analytics.
2d	Stakeholder engagement.
2e	Document review.
2f	Market overview.
3	Appraising business structures, business architecture, operating models and business performance measurement.
4	Business case including performance metrics for measurable achievement of benefits and alignment to stakeholder aims.
5	Business process reengineering to achieve step change in performance.
6	Change management, which includes:
6a	Structural reviews.
6b	Organisational diagnosis.
6c	Role design.
6d	Re-organisation.
6e	Organisation redesign.
6f	Rationalisation and efficiency, to include transformation solutions.
7	Competition policy.
8	Regulatory advice.
9	Data and analytics, which includes:
9a	Business intelligence.
9b	Market studies and analysis.
9c	Regulation benchmarking and statistical analysis.
9d	Skills analysis, audit and capability management.
9e	Forecasting, planning and development.
9f	Complex cost benefit studies and analysis.
10	Corporate responsibility.
11	Environmental strategy and policy.
12	Sustainability.
13	Strategic advice.

2.5. FRAMEWORK REQUIREMENTS – MANDATORY REQUIREMENTS – ALL LOTS

Suppliers for Lot 1, Lot 2, Lot 3 and Lot 4 shall be able to provide all the Mandatory Service requirements set out below in paragraphs 2.5.1 to 2.5.8.

2.5.1. Service Filters

2.5.1.1. The Supplier shall adhere to paragraph 3.1 and 3.2 of Framework Schedule 5 of Attachment 4a (Framework Agreement).

2.5.1.2. Service Filter Technology

- CCS reserves the right to;

- change and/or amend the Service Filter technology platform.
- transition the Services Filters to a new/alternative technology platform.

2.5.2. Assignment, project, programme, portfolio reviews, analysis and recommendations

- 2.5.2.1. The Supplier shall deliver the Services in accordance with Good Industry Practice.
- 2.5.2.2. The Supplier shall provide the Customer with a plan for the Services which includes; outcomes, deliverables, project updates; including milestones, delivery blockers, individuals, barriers, dependencies, mitigations, risks and issues.
- 2.5.2.3. Where required the Supplier shall ensure that at least one member of the project team has a relevant project management qualification for example PRINCE2, six sigma, AMP or equivalent.

2.5.3. Commercial models

- 2.5.3.1. The Supplier shall ensure the most effective and efficient resourcing model is offered to the Customer.
- 2.5.3.2. The Supplier shall have processes and systems in place to ensure costs and pricing are managed appropriately during the Call Off Contract. This shall ensure that an effective mix of the grades of the project team are assigned and managed during the Call Off Contract to ensure best value for money for the Customer.
- 2.5.3.3. The Supplier shall ensure that the assignment is completed to the Customer's budget and timeframe. If there is any variance to this the Supplier shall inform the Customer as soon as possible, and where possible mitigate the time lost.
- 2.5.3.4. The Supplier shall, at all times, maintain accurate records of all payments and other matters relating to its duties and retain copies of all invoices and supporting documentation. If requested, the Supplier shall make such records available to the CCS and individual Customers, in accordance with Clause 18 (Records, Audit Access and Open Book Data) of the Framework Agreement.
- 2.5.3.5. The Supplier shall provide Supplier Personnel who have the relevant professional technical skills, competence and experience in order to deliver the Services to the Customer. This may include, but not be restricted to:
 - Successful delivery of relevant Services (national and international), across either the public and/or private sector.
 - Working collaboratively with mixed assignment teams, which contain individuals from both the Supplier and the Customer.
- 2.5.3.6. The Supplier shall provide Supplier Personnel, whose standard of security clearance is compliant with CCS and the Customer's security requirements (to be confirmed in the Further Competition Procedure).

- 2.5.3.7. The Supplier shall be able to deliver at pace whilst not impacting on the quality of the advice and output.
- 2.5.3.8. For each Call Off Contract, the Supplier may be required to provide multiple proposals to the Customer. This may include different delivery options, costing models, or other variants, to the Customer. The Supplier may be asked to provide a clear assessment of each option and a recommendation, the content may include but is not limited to, practicality, opportunities to optimise their resource utilisation, timescales, costs, comparative value for money, risks and dependencies.
- 2.5.3.9. The Supplier shall have to develop a resourcing plan, which shall include capacity to produce reports, outlining strategies, identifying programmes of work and associated project plans to achieve the required efficiencies and outcomes of the Services.
- 2.5.3.10. If applicable the Supplier shall ensure the co-ordination of all outputs provided by its supply chain in the delivery of the Services, and shall effectively manage all of the interface risks to provide a seamless service to the Customer.
- 2.5.3.11. The Supplier shall improve Sub-Contractor arrangements to achieve continuous improvement in the delivery of the Services as set out in the Framework Agreement and Call Off Agreements.
- 2.5.3.12. The Supplier shall select its Sub-Contractors through fair, open and transparent competition.
- 2.5.3.13. The Customer may require one of the following pricing models (to be confirmed in the Further Competition Procedure). The Customer is not limited to these models and may introduce and agree appropriate models which better demonstrate value for money:
 - Time and materials.
 - Fixed fee.
 - At risk.

2.5.4. Knowledge transfer

- 2.5.4.1. The Supplier shall create a central lessons learnt log and knowledge share with key learnings included from each Call Off Contract. CCS and Customers shall be granted access to the lessons learnt log and knowledge share free of charge.
- 2.5.4.2. The Supplier shall ensure that knowledge acquired during the Call Off Contract term is transferred to the Customer, which allows for the Customer to improve awareness of strategic approaches, upskill the Customer's personnel and share market intelligence.
- 2.5.4.3. It will be the Customer's right to further share the learnings to internal and external stakeholders.
- 2.5.4.4. The Supplier shall deliver mentoring and coaching as appropriate to the Customer to ensure effective engagements.

2.5.5. Management information

- 2.5.5.1. The Supplier shall provide Management Information to CCS as detailed in Framework Schedule 9 (Management Information).
- 2.5.5.2. The Supplier shall provide a report on a monthly basis to CCS detailing all Services that the Supplier is delivering into all

Customers. This is to support the increase of commercial, administrative efficiencies and benefits including the future development of this Framework Agreement.

2.5.5.3. The Supplier shall provide a list of all their consultancy contracts/stakeholders to CCS within one month of the Framework Commencement Date and then on a quarterly basis until the end date of the Framework Agreement.

2.5.5.4. The Supplier shall also provide the following information included within the Management Information report:

- Off Framework Agreement spend with central government departments and wider public sector.
- Report of Services (as detailed in paragraphs 3 to 6 of this document).
- Further competition details, for example direct award, further competition or single tender action.

2.5.6. Contract management

2.5.6.1. The Supplier shall adhere to the requirements of Framework Schedule 8 (Framework Management).

2.5.6.2. The Supplier shall maintain a working knowledge of public competition, tendering and financial regulations.

2.5.6.3. The Supplier shall provide a full exit management plan to the Customer as detailed in Call Off Schedule 9 (Exit Management).

2.5.6.4. The Supplier shall ensure that it raises its standards of Service delivery throughout the Framework Period, and shall promote best practice to become working practice.

2.5.6.5. The Supplier shall work with its supply chain (if applicable) and the Supplier Personnel to proactively manage project risks, and to deliver mutual benefits and the most successful outcome for the Customer.

2.5.6.6. The Supplier shall alert CCS and/or the Customer of any adverse media statements in any format directly relating to themselves or the Services provided under this Framework Agreement as per paragraph 28 (Publicity and Branding) of the Framework Agreement.

2.5.6.7. The Supplier shall ensure that they deliver the Services as detailed in the Further Competition Procedure and the Customer shall not have to extend the Call Off Contract.

2.5.6.8. The Supplier will record the security clearance level of the Supplier Personnel, for the Customer and the security reference number in the technology platform.

2.5.7. Marketing

2.5.7.1. The Supplier shall work with CCS and/or the Customer to agree on-going marketing and publicity and general promotional material and initiatives throughout the term of the Framework Agreement. The Supplier shall raise awareness of the Services and encourage uptake, in accordance with the requirements of Framework Schedule 29 (Marketing).

2.5.7.2. Any marketing materials shall be agreed in advance by CCS and/or Customer and contain branding specific to the Customer if required at no additional cost.

2.5.7.3. The supplier shall not site or disparage CCS reputationally during their marketing or sales activity or communications for this Framework Agreement or any others from CCS, in accordance with Framework Agreement.

2.5.8. Spend under management and savings

2.5.8.1. The Supplier shall work collaboratively with CCS and/or Customers to identify and deliver savings, and identify and act on, opportunities for increased spend under management throughout the life of the Framework Agreement.

2.5.8.2. The Supplier shall support CCS with reasonable endeavours to record savings with Customers of this Framework Agreement.

Annex One – Service Filters

Service Lines

- The Customer can filter on the service lines as detailed in paragraphs 2.1.2 and 2.2.1 of this document

Sectors and the Supplier staff's experience by sub division.

Central Government
Devolved Administrations
Education
Fire and Rescue
Health
Local Government
Not for Profit
Police
Utility

Expenses

- Customers will have the ability to stipulate whether they are willing to pay travel and subsistence

Regions

High Region	Sub Region
North East, England	Tess Valley & Durham
	Northumberland and Tyne and Wear
North West, England	Cumbria
	Cheshire
	Greater Manchester
	Lancashire
Yorkshire and the Humber, England	Merseyside
	East Riding and North Lincolnshire
	North Yorkshire
	South Yorkshire
East Midlands, England	West Yorkshire
	Derbyshire and Nottinghamshire
	Leicestershire, Rutland and Northamptonshire
West Midlands, England	Lincolnshire
	Herefordshire, Worcestershire and Warwickshire
	Shropshire and Staffordshire
East of England	West Midlands
	East Anglia
	Bedfordshire and Hertfordshire
London, England	Essex
	Inner London - West
	Inner London - East
	Outer London - East and North East
	Outer London - South
South East, England	Outer London - West and North West
	Berkshire, Buckinghamshire, and Oxfordshire
	Surrey, East and West Sussex
	Hampshire and Isle of Wight
South West, England	Kent
	Gloucestershire, Wiltshire and Bristol/Bath area
	Dorset and Somerset
	Cornwall and Isles of Scilly
Wales	Devon
	West Wales and The Valleys
Scotland	East Wales
	Eastern Scotland
	South Western Scotland
	North Eastern Scotland
	Highlands and Islands

3. Call off contract

3.1. How a call off agreement is structured

If a buyer decides to buy from you, you and the buyer will form a Call Off Contract. The Order Form will specify all the parts of the Call Off Contract.