

CUSTOMER GUIDANCE: COMPLETING THE CALL-OFF ORDER FORM

This document has been written to help Buyers complete the CCS Logistics & Warehousing Order Form (RM6074).

The document should be used as a walkthrough and each part of the order form is addressed in chronological order, from beginning to the end. At every opportunity screenshots have been used to help buyers match their own forms to the guidance notes in this document.

The document has been compiled by the CCS Logistics & Warehousing category team and it should only be used by Buyers intending to use that framework agreement.

This document does not provide legal advice, and Buyers should not use it for that purpose.

CONTENTS

THE OPENING DETAILS	2
APPLICABLE FRAMEWORK CONTRACT	3
FRAMEWORK LOT NUMBER	4
CALL-OFF INCORPORATED TERMS	5
CALL-OFF SPECIAL TERMS	6
CONTRACT TERM	6
CALL-OFF DELIVERABLES	6
MAXIMUM LIABILITY	7
CALL-OFF CHARGES	8
REIMBURSABLE EXPENSES	8
PAYMENT METHOD	8
BUYERS ADDRESS	9
BUYER'S AUTHORISED REPRESENTATIVE	9
BUYER'S ENVIRONMENTAL POLICY	9
SUPPLIER'S AUTHORISED REPRESENTATIVE	10
SUPPLIER'S CONTRACT MANAGER	10
PROGRESS REPORT FREQUENCY	10
PROGRESS MEETING FREQUENCY	11
KEY STAFF	11
KEY SUBCONTRACTORS	11
COMMERCIALLY SENSITIVE INFORMATION	12
SERVICE CREDITS	13
ADDITIONAL INSURANCES	14
GUARANTEE	14
SOCIAL VALUE COMMITMENT	15
JOINT SCHEDULES	16
CALL-OFF SCHEDULES	19

THE OPENING DETAILS

This section outlines the basic information of the contract between Buyer and Supplier. It identifies who the Supplier and Buyer are, and provides references so that the contract can be matched to a particular competition (if necessary).

Order Form	
CALL-OFF REFERENCE:	[Insert] Buyer's contract reference number]
THE BUYER:	[Insert] Buyer's name]
BUYER ADDRESS	[Insert] business address]
THE SUPPLIER:	[Insert] name of Supplier]
SUPPLIER ADDRESS:	[Insert] registered address (if registered)]
REGISTRATION NUMBER:	[Insert] registration number (if registered)]
DUNS NUMBER:	[Insert] if known]
SID4GOV ID:	[Insert] if known]

CALL-OFF REFERENCE	The Buyer should insert a reference number specific to this Call-Off contract. This code will identify the contract and will help match invoices raised by the supplier to this agreement.
THE BUYER	This should be the name of the buying organisation
BUYER ADDRESS	The address linked to the buying organisation named above.
THE SUPPLIER	This is the name of the Supplier organisation that you are awarding the contract to. This organisation will be one of the 25 suppliers on this Framework Agreement. Do not include details of Subcontractors here.
SUPPLIER ADDRESS	Insert the head office address for the awarded supplier. Your supplier should be able to supply this information or you can find this address in the Products and Suppliers section on the Framework webpage.
REGISTRATION NUMBER	Insert the company registration number for the supplier that you are awarding the contract to. If the supplier is unable to tell you this number, CCS can provide it for you.
DUNS NUMBER	All of the suppliers on this Framework are registered with the credit reference agency Dun & Bradstreet (D&B). D&B provides all registered companies with a registration number that identifies them (the DUNS number). If the supplier is unable to tell you their DUNS number, CCS can provide it to you on request.

SID4GOV ID

Insert the reference number for the competition as listed on Contracts Finder (if known). This will help match the awarded contract back to the advertised commercial opportunity.

APPLICABLE FRAMEWORK CONTRACT

APPLICABLE FRAMEWORK CONTRACT

This Order Form is for the provision of the Call-Off Deliverables and dated [Insert date of issue].

It's issued under the Framework Contract with the reference number **RM6074** for the provision of **Logistics and Warehousing**.

This section specifies which CCS agreement your Call-Off contract is being awarded against. CCS offers a large number of different commercial agreements and some of our suppliers provide services on more than one agreement. This helps clarify the governing CCS agreement.

Action required: Delete the guidance in square brackets and insert in its place the date this Call-Off contract is sent to the supplier.

FRAMEWORK LOT NUMBER

Lot Number	Lot Description	Relevant (Yes / No)
1	Logistics - Transport	No
2	Logistics - Warehousing and Storage	Yes
3	Waste Logistics, Recycling, Disposal and Destruction	No
4	Removals and Relocations	No
5	Vehicle, Plant and Industrial Equipment – Transportation and Storage	No
6	Construction Logistics – Transportation and Storage	No
7	Healthcare Logistics – Transportation and Storage	No
8	Logistics and Warehousing Solutions, Design and Support Services	No

Services on this Framework are split into 8 different 'Lots'. The scope of services available under each Framework lot is clearly defined in **Framework Schedule 1: Specification**, which is available for download from the **Documents** section of the [Framework web page](#).

It is important to invite all suppliers on your chosen Framework lot to submit a bid for your contract.

Action required: Once you have clearly defined a written statement of requirements, read Framework Schedule 1 to determine which of the Framework lots provides the services that match your needs. Using the table shown above in your order form, indicate which Lot you will be using by entering a 'Yes' in the relevant row.

CALL-OFF INCORPORATED TERMS

- Joint Schedules for **RM6074**
 - Joint Schedule 2 (Variation Form)
 - Joint Schedule 3 (Insurance Requirements)
 - Joint Schedule 4 (Commercially Sensitive Information)
 - [Joint Schedule 6 (Key Subcontractors)]
 - [Joint Schedule 7 (Financial Difficulties)]
 - [Joint Schedule 8 (Guarantee)]
 - [Joint Schedule 9 (Minimum Standards of Reliability)]
 - Joint Schedule 10 (Rectification Plan)
 - Joint Schedule 11 (Processing Data)
 - [Joint Schedule 12 (Supply Chain Visibility)]
 - [Joint Schedule 13 (Continuous Improvement)]
 - [Joint Schedule 14 (Benchmarking)]
 - Call-Off Schedules for [insert Call-Off reference number]
 - Call-Off Schedule 1 (Transparency Reports)
 - Call-Off Schedule 2 (Staff Transfer)
 - [Call-Off Schedule 5 (Pricing Details)]
 - [Call-Off Schedule 7 (Key Supplier Staff)]
 - [Call-Off Schedule 8 (Business Continuity and Disaster Recovery)]
 - [Call-Off Schedule 9 (Security)]
 - [Call-Off Schedule 10 (Exit Management)]
 - [Call-Off Schedule 12 (Clustering)]
 - [Call-Off Schedule 13 (Implementation Plan and Testing)]
 - [Call-Off Schedule 14 (Service Levels)]
 - [Call-Off Schedule 15 (Call-Off Contract Management)]
 - [Call-Off Schedule 17 (MOD Terms)]
 - [Call-Off Schedule 18 (Background Checks)]
 - [Call-Off Schedule 19 (Scottish Law)]
 - [Call-Off Schedule 20 (Call-Off Specification)]
 - [Call-off Schedule 21 (Northern Ireland Law)]
4. CCS Core Terms (version 3.0.7)
5. Joint Schedule 5 (Corporate Social Responsibility) **RM6074**
6. [Call-Off Schedule 4 (Call-Off Tender) as long as any parts of the Call-Off Tender that offer a better commercial position for the Buyer (as decided by the Buyer) take precedence over the documents above.]

This section indicates which of the available schedules you are including in your Call-Off contract.

RM6074 uses the Public Sector Contract (PSC) as its base. The PSC

The PSC is comprised of 4 elements, which are:

- 1) Core Terms
- 2) Call-Off Schedules (applicable only to the Buyer-Supplier relationship)
- 3) Framework Schedules (applicable only to the CCS-Supplier relationship)
- 4) Joint Schedules (potentially applicable to both the CCS-Supplier or Buyer-Supplier relationship)

The PSC allows buyers to identify which of the available schedules (joint schedules and/or Call-Off schedules) are relevant to their Call-Off contract. Call-Off schedules are only relevant to contracts between the Buyer and the Supplier, whereas Joint Schedules will also feature in CCS' contract with its suppliers.

Schedules highlighted in yellow in the above image are optional and buyers can choose not to include them in their contracts if they feel that they are not relevant.

Action required: Review the terms of each schedule and make a decision on its relevance to your contract. If you feel that it isn't relevant, please delete it from the list in the image above and do not include it in your contract.

CALL-OFF SPECIAL TERMS

CALL-OFF SPECIAL TERMS	
The following Special Terms are incorporated into this Call-Off Contract:	
[Insert terms to revise or supplement Core Terms, Joint Schedules, Call Off Schedules; or none]	
[Special Term 1]
[Special Term 2.]
[Special Term 3.]
[None]	

It is possible to complement the Call-Off contract with Special Terms that revise or supplement the standard terms of this agreement.

Action required: Consider if the core terms and additional schedules provide the contractual coverage that your organisation requires. If not, list any additional terms in this section of the Order Form. Please note that CCS is not able to provide legal advice to buyers using this agreement.

CONTRACT TERM

CALL-OFF START DATE:	[Insert Day Month Year]
CALL-OFF EXPIRY DATE:	[Insert Day Month Year]
CALL-OFF INITIAL PERIOD:	[Insert Years, Months]

In this section, Buyers are asked to specify the contract term. Buyers must provide the contract commencement and expiry date as well as the expiry date of the initial term (prior to any optional extensions being employed). Please be aware that Call-Off contracts may only be extended if there the Order Form specifies that extension is a possibility.

Action required: Insert the start and expiry dates for the contract. This should include any implementation or exit management activity. Specify the expiry date for the initial period of the contract term. This should be exclusive of any optional extension periods.

CALL-OFF DELIVERABLES

CALL-OFF DELIVERABLES
[Buyer guidance: complete option A or, if Deliverables are too complex for this form, **use** option B and Call-Off Schedule 20 instead. **Delete** the option that is not used.]
[Option A: [Name of Deliverable][Quantity][Delivery date][Details]
[Option B: See details in Call-Off Schedule 20 (Call-Off Specification)]

Call-Off Deliverables refers to the contract services. Customers should ensure that the agreed Deliverables are included in the final signed contract to ensure there is no ambiguity about the obligations of the buyer/supplier.

Action required: Either:

- a) Paste your agreed Deliverables here. This is likely to be your Statement of Requirements unless they have undergone changes during the competition process.
- b) Paste your agreed Deliverables into Call-Off Schedule 20 (Call-Off Specification) and refer the reader to that schedule here.

MAXIMUM LIABILITY

MAXIMUM LIABILITY
The limitation of liability for this Call-Off Contract is stated in Clause 11.2 of the Core Terms.
[Buyer guidance: you can change the cap on liability in Clause 11.2 where you have made an appropriate risk assessment and sought the necessary management approvals. Unlimited liability is not permitted]

The maximum liability section specifies the maximum financial liability that a supplier is liable for in the event of a default.

As is noted by the guidance on the Order Form, unlimited liability is not permitted.

The standard liability level for this Framework is specified in Clause 11.2 of the Core Terms:

“Each Party's total aggregate liability in each Contract Year under each Call-Off Contract (whether in tort, contract or otherwise) is no more than the greater of £5 million or 150% of the Estimated Yearly Charges unless specified in the Call-Off Order Form”

It is important that your liability limit is proportionate to the services that you are sourcing.

Contracts with disproportionately high liabilities will be commercially unappealing and are less likely to receive as competitive a price. It is equally important that your maximum liability level is high enough to provide suitable contractual protection.

CCS are not able to advise a suitable liability limit. Buyers should seek internal guidance if they are uncertain what limit to use.

Action required: Buyers should review the liability limit for the standard terms. Consider if this limit is appropriate for their contract, seeking internal advice or conducting a risk assessment if needed. Buyers should then either:

- a) Keep the standard liability limit and insert in this section of the Order Form the following wording “[The limitation of liability for this Call-Off Contract is stated in Clause 11.2 of the Core Terms.](#)”
- b) Set a different liability limit by using the following statement: “[The Estimated Year 1 Charges used to calculate liability in the first Contract Year is \[..\]](#)”. Insert Estimated Charges in the first 12 months of the Contract. The Buyer must always provide a figure here.

CALL-OFF CHARGES

CALL-OFF CHARGES

[Buyer guidance: Use option A or, if charging model is too complex to detail in this form or must be embedded, **use** option B and Call-Off Schedule 5 instead. **Delete** the option that is not used.]

[Option A: Insert the Charges for the Deliverables]

[Option B: See details in Call-Off Schedule 5 (Pricing Details)]

[Delete if not used: All changes to the Charges must use procedures that are equivalent to those in Paragraphs 4, 5 and 6 (if used) in Framework Schedule 3 (Framework Prices)]

[Delete if by direct award or if not otherwise used: The Charges will not be impacted by any change to the Framework Prices. The Charges can only be changed by agreement in writing between the Buyer and the Supplier because of:

- [Indexation]
- [Specific Change in Law]
- [Benchmarking using Call-Off Schedule 16 (Benchmarking)]

Buyers should ensure that the contract charges are included in the signed contract. This section of the order form clarifies what charges both parties have agreed to.

Action required: Buyers should either:

- a) Paste the agreed contract charges into this section of the order form, or
- b) Paste them into Call-Off Schedule 5 and refer the reader to them in this section of the Order Form.

It is at the Buyer’s discretion whether or not to permit the Supplier to apply for an increase to the contract charges. If suppliers are not permitted to increase contract charges, Buyers should delete the last two paragraphs from this section of the order form.

REIMBURSABLE EXPENSES

REIMBURSABLE EXPENSES

[Insert None or insert Recoverable as stated in the Framework Contract]

Some buyers will allow suppliers to claim back expenses for certain activities. Consider if this is something that you need to include in your contract.

Action Required: State 'None' if the Supplier is not permitted to claim reimbursable expenses. State "Recoverable as stated in the Framework Contract" if the Supplier is allowed to do this.

PAYMENT METHOD

PAYMENT METHOD [Insert payment method(s) and necessary details]
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This part of the Order Form specifies the payment terms for the Call-Off Contract. Buyers should ensure that their terms do not contract the terms of clause 4.4 of the Core Terms (below):

"The Buyer must pay the Supplier the Charges within 30 days of receipt by the Buyer of a valid, undisputed invoice, in cleared funds using the payment method and details stated in the Order Form."

Action required: Insert the agreed payment method (e.g. BACS, procurement card) and the payment terms (e.g. 30 days of receipt by the Buyer of a valid, undisputed invoice).

BUYERS ADDRESS

BUYER'S INVOICE ADDRESS: [Insert name] [Insert role] [Insert email address] [Insert address]
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Action required: Insert your organisation's invoicing address. If you are in doubt what address this should be, please consult your Finance department.

BUYER'S AUTHORISED REPRESENTATIVE

BUYER'S AUTHORISED REPRESENTATIVE [Insert name] [Insert role] [Insert email address] [Insert address]

The Authorised Representative is the person who has the authority to enter into contract with the Supplier on the Buying Organisation's behalf. This is the person who will sign this Order Form.

Action required: Insert your Authorised Representative's details.

BUYER'S ENVIRONMENTAL POLICY

BUYER'S ENVIRONMENTAL POLICY
[Insert details [Document name] [version] [date] [available online at:]
or insert: [Appended at Call-Off Schedule X]]

Clause 30 of the Core Terms of this Framework requires the supplier to perform their contractual obligations in compliance with the Buyer's Environmental Policy:

30.1 "When working on Site the Supplier must perform its obligations under the Buyer's current Environmental Policy, which the Buyer must provide"

30.2 "The Supplier must ensure that Supplier Staff are aware of the Buyer's Environmental Policy."

Action required: insert your environmental policy as a separate Call-Off Schedule or if it is published in the public domain, include a link to it here.

SUPPLIER'S AUTHORISED REPRESENTATIVE

SUPPLIER'S AUTHORISED REPRESENTATIVE
[Insert name]
[Insert role]
[Insert email address]
[Insert address]

The Supplier's Authorised Representative is the person who will sign the Call-Off Contract.

Action required: Ask your chosen supplier to provide details of their Authorised Representative.

SUPPLIER'S CONTRACT MANAGER

SUPPLIER'S CONTRACT MANAGER
[Insert name]
[Insert role]
[Insert email address]
[Insert address]

Action required: Ask your chosen supplier to provide details of the person in their staff who will act as contract manager for this Call-Off Contract.

PROGRESS REPORT FREQUENCY

PROGRESS REPORT FREQUENCY
[Insert report frequency: On the first Working Day of each calendar month]

Clause 6.1 of the Core Terms require the Supplier to attend Progress Meetings and provide Progress Reports when specified in the Order Form. Progress Meetings might be required if there is a process of implementation that a Supplier is required to fulfil in order to be able to provide a service by an agreed milestone date.

Action required: Consider if Progress Meetings and Progress Reports are needed. If they are not, clarify this by marking this section as 'Not Applicable'. If Progress Meetings and Reports are required, specify how often they will be needed in this section of the Order Form.

PROGRESS MEETING FREQUENCY

PROGRESS MEETING FREQUENCY

[Insert meeting frequency: Quarterly on the first Working Day of each quarter]

If Progress Meetings are required, their frequency and date should be specified in this section of the Order Form.

Action Required: Specify the regularity and date of Progress Meetings if they are needed. If Progress Reports or Progress Meetings are not needed, clarify this by specifying that this section of the Order Form is 'Not Applicable'.

KEY STAFF

KEY STAFF

[Insert name]

[Insert role]

[Insert email address]

[Insert address]

The Buyer is able to specify 'Key Roles' that are integral to the performance of this contract.

Call-Off Schedule 7 places certain obligations on the Supplier when Key Roles are specified in the Order Form. These obligations include:

- ensuring that the Key Staff fulfil the Key Roles at all times during the Contract Period
- ensuring that Key Staff are not removed without the Buyer's agreement unless through specified reasonable circumstances (Call-Off Schedule 7, 1.4)
- taking reasonable steps to ensure that Key Roles are appropriately filled (Call-Off Schedule 7, 1.5)

Action Required: If Key Roles are identified, the Buyer should specify them in Annex 1 to Call-Off Schedule 7 and refer to them in this section of the Order Form together with the relevant Key Staff details.

KEY SUBCONTRACTORS

KEY SUBCONTRACTOR(S)

[Insert name (registered name if registered)]

'Key Subcontractor' is a defined term in the Framework Agreement, meaning:

"Key Subcontractor"	<p>any Subcontractor:</p> <ul style="list-style-type: none"> a) which is relied upon to deliver any work package within the Deliverables in their entirety; and/or b) which, in the opinion of CCS or the Buyer performs (or would perform if appointed) a critical role in the provision of all or any part of the Deliverables; and/or c) with a Sub-Contract with a contract value which at the time of appointment exceeds (or would exceed if appointed) 10% of the aggregate Charges forecast to be payable under the Call-Off Contract, d) and the Supplier shall list all such Key Subcontractors in section 19 of the Framework Award Form and in the Key Subcontractor Section in Order Form;
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If it is the Buyer's intention to allow suppliers to subcontract all or elements of the requirement, Joint Schedule 6 should be included in the Call-Off Contract.

The terms of Joint Schedule 6 place obligations on the Supplier with regard to Key Subcontractors. Buyers should familiarise themselves with the terms of Joint Schedule 6 to ensure they are aware of these obligations.

Action required: This part of the Order Form can only be completed once an award decision has been made and whether or not the Supplier will need to make use of Key Subcontractors. If Key Subcontractors are a necessity, then the Buyer should ensure that the subcontractor's registered name (with Companies House) is inserted in this part of the Order Form.

COMMERCIALLY SENSITIVE INFORMATION

COMMERCIALLY SENSITIVE INFORMATION

[Insert Not applicable or insert Supplier's Commercially Sensitive Information]

Commercially Sensitive Information is a defined term in this Agreement:

"Commercially Sensitive Information"	the Confidential Information listed in the Framework Award Form or Order Form (if any) comprising of commercially sensitive information relating to the Supplier, its IPR or its business or which the Supplier has indicated to the Authority that, if disclosed by the
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	Authority, would cause the Supplier significant commercial disadvantage or material financial loss;
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This section of the Order Form clarifies information that has been supplied by the Supplier that may be deemed to be genuinely commercially sensitive and would be subject to an exemption under the Freedom of Information Act and Environmental Information Regulations.

Action Required:

- **If ‘Not Applicable’:** If commercially sensitive information has not been provided by the Supplier, the Buyer should note this section of the Order Form as ‘Not Applicable’ and omit Joint Schedule 4 from the Call-Off Contract. Buyers should record any commercially sensitive information here
- **If Commercially Sensitive Information is provided:** by the Supplier, then the Buyer should record that information in this section of the Order Form, and in Joint Schedule 4.

SERVICE CREDITS

SERVICE CREDITS
 [Insert Not applicable]
 [or insert Service Credits will accrue in accordance with Call-Off Schedule 14 (Service Levels).
 The Service Credit Cap is: [Insert £value].
 The Service Period is: [Insert duration: one Month]
 A Critical Service Level Failure is: [Buyer to define]

Buyers should read Call-Off Schedule 14 (Service Levels), which explains the obligations of Buyers and Suppliers with regard to Service levels and Service Credits.

Buyers have the right to include Service Credits that are chargeable in the event of a Service Level Failure.

If Service Credits are used, the Buyer will need to specify the Service Credit Cap, which is the maximum value that Service Credits can collectively reach over a 12 month period. If Service Credits exceed the cap, then Buyer and Supplier can consider that a Critical Service Level Failure has occurred and act accordingly. The Service Credit Cap is in place to ensure that Service Credits do not become financially unmanageable for the Supplier and also to ensure that Buyers have a contractual mechanism to protect against persistent Supplier default. It is the Buyer’s responsibility to consider what Service Credits they are including in their Call-Off Contract and set the Service Credit Cap accordingly. CCS cannot advise a suitable value for the Service Credit Cap.

The Critical Service Level Failure is a defined circumstance or default that would allow the Buyer to cease collection of any Service Credits and seek compensation from the Supplier (see Call-Off Schedule 14). An example of such a circumstance might be if the contract services were unavailable for longer than a defined period of time.

Action Required:

Buyers should clearly specify any Service Credits in Annex A to Part A of Call-Off Schedule 14 (Service Levels). If Service Credits are included in the contract, the Buyer must provide a suitable value for the Service Credit Cap and the Service Period. The Buyer must also define circumstances that would constitute a Critical Service Level Failure.

If Service Credits are not used, mark this section of the Order Form as 'Not Applicable'.

ADDITIONAL INSURANCES

ADDITIONAL INSURANCES

[Insert] Not applicable

Or insert details of Additional Insurances required in accordance with Joint Schedule 3 (Insurance Requirements)]

All Suppliers on RM6074 are required to hold and provide evidence of the following insurances when requested by Buyers or by CCS:

- employers' liability insurance with cover (for a single event or a series of related events and in the aggregate) of not less than Five million pounds (£5,000,000)
- public liability insurance with cover (for a single event or a series of related events and in the aggregate) of not less than two million pounds (£2,000,000)
- (For Lot 8 only) professional indemnity insurance with cover (for a single event or a series of related events and in the aggregate) of not less than one million pounds (£1,000,000)

The insurance requirements for this Agreement are specified in Joint Schedule 3 (Insurance Requirements) of this Framework.

Action required: Buyers who require that their Suppliers procure additional insurances to those mandatory for this agreement should specify the insurances that they need in this section of the Order Form. If Buyers do not require the Supplier to procure any additional insurances they should mark this section of the Order Form as 'Not Applicable'.

GUARANTEE

GUARANTEE

[Insert] Not applicable

Or insert The Supplier must have a Call-Off Guarantor to guarantee their performance using the form in Joint Schedule 8 (Guarantee)

Or insert There's a guarantee of the Supplier's performance provided for all Call-Off Contracts entered under the Framework Contract]

As per the Guidance Note at the beginning of Joint Schedule 8 (Guarantee), Buyers should consider asking for a deed of guarantee from a Guarantor if a financial evaluation has indicated the need for one.

Action Required: If a Guarantee is required, Buyers should use either one of the options in this section of the Order Form. Alternatively, if a Guarantee is not needed, this section should be marked as 'Not Applicable'.

SOCIAL VALUE COMMITMENT

SOCIAL VALUE COMMITMENT

[Insert Not applicable **or insert** The Supplier agrees, in providing the Deliverables and performing its obligations under the Call-Off Contract, that it will comply with the social value commitments in Call-Off Schedule 4 (Call-Off Tender)]

Buyers for Central Government organisations should refer to [Procurement Policy Note \(PPN\) 06/20 – taking account of social value in the award of central government contracts](#).

Buyers for organisations in the wider public sector should refer to their own procurement policies concerning the evaluation of the wider social value benefit from commercial contracts.

Action required: Mark as 'Not Applicable' if social value was not included in the evaluation of bids for this Call-Off Contract. If supplier bids have been evaluated against a criteria that includes added social value, the Buyer should use the second option in this section of the Order Form to clarify the Supplier's obligations to fulfil the commitments they have made in their Call-Off Tender.

JOINT SCHEDULES

Joint Schedules are relevant to Framework Contracts between CCS and Framework suppliers; and also to the Call-Off Contracts between Buyers and their awarded Supplier. Not all of the Joint Schedules will be relevant to every Call-Off Contract so Buyers should review the list below and decide which to include or discard.

Schedules that have been highlighted in grey are Optional for Buyers to include in their Call-Off Contracts.

The table below indicates when Buyers should update (if required) certain schedules in the Call-Off process. When following the Further Competition procedure, Buyers should always complete the Call-Off Order Form before the competition commences and should always share this document with bidding Suppliers alongside the ITT to maintain transparency about the terms that the Contract will include. Whilst pre-completion of the Call-Off Order Form is the best practise approach that CCS would advise, it is recognised that not all elements of the Order Form can be completed until a successful Supplier has been identified. The table below, therefore identifies when Buyers should update each schedule, either before the competition, at award stage, or post award (in the case of variation forms, etc.).

Schedule Title	Schedule content summary	Optional at Call-Off?	Amount and type of input (includes data)	When is input required?
Joint Schedule 1 (Definitions)	Clarifies what the capitalised terms in the documents mean and explains how to interpret the contract. JS1 includes all of the shared definitions that appear in more than one schedule. Definitions that appear in only one schedule are defined in the schedule they appear in.	Mandatory inclusion in Call-Off Contract	JS1 must not be amended. Any new definitions or amendments must be added/made by creating a special term in the order form.	N/A
Joint Schedule 2 (Variation Form)	The form used by the Buyer to document and formalise changes to the Call-Off Contract after it has been awarded.	Mandatory inclusion in Call-Off Contract	This only needs to be completed if a contract change is needed post-award.	After the award.
Joint Schedule 3 (Insurance Requirements)	Specifies the insurance needed by a supplier in case it breaches a contract or is found to be negligent.	Mandatory inclusion in Call-Off Contract	JS3 must not be amended. Any additional insurances that are required by the Buyer should be documented in the Additional Insurances section of the Order Form.	Before the competition.

Joint Schedule 4 (Commercially Sensitive Information)	Details the information about the Supplier that cannot be disclosed or reported to the public (subject to clause 16).	Mandatory inclusion in Call-Off Contract	Any commercially sensitive information that has been identified as part of the Call-Off Award should be recorded in the Commercially Sensitive Information section of the Order Form.	At award.
Joint Schedule 6 (Key Subcontractors)	This schedule grants the Buyer rights over the management of Key Subcontractors, e.g. restrictions on the supplier concerning the replacement or change of Key-Subcontractors.	Optional inclusion in Call-Off Contract	JS 6 must not be amended. Any Key Subcontractors that are identified should be recorded in the Key Subcontractor(s) section of the Order Form.	At award if needed.
Joint Schedule 7 (Financial Difficulties)	Clarifies what action is required from the Supplier if they find themselves in financial difficulty or if there are changes to their credit rating.	Optional inclusion in Call-Off Contract	To be used if there are specific cases for concerns about the delivery of the contract. The Buyer is required to insert long-term credit ratings for the Supplier and the relevant guarantor and subcontractors (if applicable).	After the award.
Joint Schedule 8 (Guarantee)	The deed of guarantee is a document signed by a third party to provide additional assurance that the supplier will meet their contractual obligations.	Optional inclusion in Call-Off Contract	A small amount of data needed in Annex 1 of this schedule.	At award if needed
Joint Schedule 9 (Minimum Standards of Reliability)	This schedule restricts the Buyer and Supplier entering into a contract under the terms of this Framework if the Supplier does not meet the standards required in the OJEU Contract Notice. JS9 arises from the requirements of PPN 09/12 'Taking Account Of A Bidder's Past Performance'.	Optional inclusion in Call-Off Contract	Only required for Call-Off Contracts with a value exceeding £20M. No Buyer input required.	Before the competition.
Joint Schedule 10 (Rectification Plan)	Sets out the process that is followed if a Supplier defaults on a contract.	Mandatory inclusion in Call-Off Contract	This need only be completed if a supplier defaults on a Call-Off Contract.	After the award.
Joint Schedule 11 (Processing Data)	Provides details about the data processing that a supplier is permitted to do.	Mandatory inclusion in Call-Off Contract	Complete Annex 1 by providing the required data in the highlighted sections. Some information will be required from the Supplier. Annex 2 is relevant only when joint controller status is agreed between Buyer and Supplier.	At award.
Joint Schedule 12 (Supply Chain Visibility)	Places obligations on the Supplier with regard to advertisement of supply chain opportunities and visibility of supply chain spending.	Optional inclusion in Call-Off Contract	No Buyer input is required.	Before the competition.

Joint Schedule 13 (continuous Improvement)	Sets out the Buyer's rights and Supplier obligations with regard to identifying and pursuing opportunities for continuous improvement in the Call-Off Contract.	Optional inclusion in Call-Off Contract	No Buyer input is required.	Before the competition.
Joint Schedule 14 (Benchmarking)	Grants the Buyer rights to terminate the contract if the Supplier fails to fulfil its benchmarking obligations. The schedule sets out the purpose, process, and reporting structure of the benchmarking exercise.	Optional inclusion in Call-Off Contract	No Buyer input is required.	Before the competition.

CALL-OFF SCHEDULES

Call-Off schedules are relevant only to the Call-Off Contract between the Buyer and the Supplier. Most of the Call-Off Schedules are optional and Buyers should review the available schedules and include in their Call-Off Contracts those schedules that are relevant to their requirements. Schedules that the Buyer deems to be not relevant can be omitted. Where Schedules are omitted, the Buyer should update the Order Form in the section marked 'Call-Off Incorporated Terms'.

Schedules that have been highlighted in grey are Optional for Buyers to include in their Call-Off Contract.

Schedule Title	Schedule content summary	Optional at Call-Off?	Amount and type of input (includes data)	When is input required?
Call-Off Schedule 1 (Transparency Reports)				
Call-Off Schedule 2 (Staff Transfer)	Call-Off Schedule 2 explains how the Buyer will protect employees' rights when the organisation or service they work for transfers to a new employer. This should be used when TUPE and/or New Fair Deal pensions could apply.	Optional inclusion in the Call-Off Contract	Carefully read the guidance at the beginning of the schedule and decide which parts are applicable to your Call-Off Contract (Parts A-E). Buyers should delete the parts of this schedule that are not relevant to their Call-Off Contract.	Before the competition.
Call-Off Schedule 4 (Call-Off Tender)	How the awarded Supplier proposes to fulfil the Contract Deliverables.	Optional inclusion in the Call-Off Contract	This schedule is used by the Buyer to document the Supplier's proposal after a	At award.

			further competition..	
Call-Off Schedule 5 (Pricing Details)	This is a placeholder schedule for pricing information additional to any contained in the Order Form. The Buyer should use this schedule to house any detail about prices that does not fit in the Order Form. This would typically be used after a further competition. At direct award a Buyer would use prices already documented in the Framework cost models.	Optional inclusion in the Call-Off Contract	Used to capture pricing detail after a further competition.	At award.
Call-Off Schedule 7 (Key Supplier Staff)	Places restrictions on the Supplier with regard to the management of staff that are crucial to the contract. The Buyer can identify roles that are crucial to the delivery of the contract Deliverables. These personnel are named in the contract at award.	Optional inclusion in the Call-Off Contract	This schedule can be used if you believe the services can only be delivered in full with named staff. The Buyer should specify in Annex 1 the Key Roles and together the Buyer and Supplier should update this schedule with the details of staff who will fulfil the Key Roles.	Before the competition and further update at award.
Call-Off Schedule 8 (Business Continuity and Disaster Recovery)	Specifies what a supplier must do in order to ensure continuity of the services if there is an unexpected disaster event.	Optional inclusion in the Call-Off Contract	Buyers can use this schedule if the contract services are critical to the Buying organisation, or if it would be difficult to replace the Supplier if the things go wrong. No input is required by the Buyer.	No input needed.
Call-Off Schedule 9 (Security)	Outlines the Supplier's obligations to ensure the safety of data and Deliverables are safe. The schedule provides for two levels of security, both requiring an appropriate security management plan which supports the buyer's security policy. Buyers can use this schedule if the supplier will either: i) handle any personal information about the public or public sector employees ii) or if the Supplier will provide services (i.e. ICT) that will store/process data with a security marking of 'Official' or above.	Optional inclusion in the Call-Off Contract	The Buyer will need to review this schedule and select whether Part A (Short Form) or Part B (Long Form) Security Requirements are applicable. The Buyer should ensure that the schedule is appropriate to the requirements. If Part B is used, Buyers should ensure the Initial Security Management Plan is attached in Annex 2 and details of the Buyer and Supplier security representatives are provided in the body of Part B where marked.	Before the competition and further update at award.

Call-Off Schedule 10 (Exit Management)	Explains what the Supplier must do at the end of a Call-Off Contract to support the Buying organisation in the continued delivery of public services. The schedule is to ensure that the supplier is suitably prepared for contract exit and sets out the requirements including exit plan, and any relevant registers. The supplier is obliged to support the re-competition of the requirement and transfer to a new supplier.	Optional inclusion in the Call-Off Contract	Small amount of input needed in the yellow highlighted areas.	Before the competition and possible update needed at award.
Call-Off Schedule 12 (Clustering)	A new schedule which enables named cluster members to contract collectively, with one buyer holding a single call-off contract. It defines the rights of the buyer and the cluster members.	Optional inclusion in the Call-Off Contract	Use this schedule if you are forming a cluster. Name the cluster members in Annex A.	Before the competition.
Call-Off Schedule 13 (Implementation Plan and Testing)	The implementation plan sets out the agreed dates for when the services will be available and tested to ensure they meet the requirements. Buyers should use this schedule if they need to monitor the implementation of a service or if they need to define a testing process for the Deliverables.	Optional inclusion in the Call-Off Contract	Buyers should specify the deadlines for the provision of the implementation plan. The Buyer should review the terms of clause 7 and amend as necessary to ensure they suit their requirements. Buyers to populate Annex 1 with the relevant milestones. If Part B (Testing) is used, Buyers should update the Satisfaction Certificate when needed.	Before the competition and further update after award.
Call-Off Schedule 14 (Service Levels)	Schedule 14 sets out the standards of service required by the Buyer and what will happen if these standards are not met by the Supplier. Buyers can use this schedule if they want to manage supplier performance using service levels/credits.	Optional inclusion in the Call-Off Contract	Buyer to update Annex A to Part A with their service levels and service credits (if applicable). Buyers should bear in mind that service levels and service credits should be proportionate to their contract requirements.	Before the competition.
Call-Off Schedule 15 (Call-Off Contract Management)	How the Buyer and Supplier will work together to manage the contract. Buyers can use this schedule to clarify how they will collaborate with the Supplier to manage the Call-Off Contract.	Optional inclusion in the Call-Off Contract	Buyers to update the Annex with details about the operational boards that will be established to jointly manage the contract. Details may include (but not be limited to) meeting frequencies/locations, operational	Before the competition and further update at award.

			board members, roles and responsibilities.	
Call-Off Schedule 17 (MOD Terms)	For use of the Ministry of Defence or Defence Infrastructure Organisation.	Optional inclusion in the Call-Off Contract	Buyers to update Annex 1 with any relevant DEFCONS or DEFFORMS.	Before the competition.
Call-Off Schedule 18 (Background Checks)	A new schedule which has been provided for Buyers who may need Supplier staff to be security vetted prior to working on the contract.	Optional inclusion in the Call-Off Contract	Buyers to review the terms of Schedule 18 and list any relevant convictions that would preclude the Supplier staff from working on the contract Deliverables.	Before the competition.
Call-Off Schedule 19 (Scottish Law)	This Call-Off Schedule 19 may be included to adapt the Core Terms and Schedules so that the Call-Off Contract is under Scottish Law. This schedule is for the use of Buyers in Scotland.	Optional inclusion in the Call-Off Contract	Buyers to include in Clause 4 any amendments to the Call-Off Schedules where Scottish Law applies.	Before the competition.
Call-Off Schedule 20 (Call-Off Specification)	Captures details about what has been ordered by the Buyer under Call-Off Contract.	Optional inclusion in the Call-Off Contract	Use this schedule to hold detail about the specification that is not included in the Order Form.	Before the competition.
Call-Off Schedule 21 (Northern Ireland Law)	This Call-Off Schedule 21 may be included to adapt the Core Terms and Schedules so that the Call-Off Contract is under Northern Ireland Law. For the purposes of Buyers in Northern Ireland.	Optional inclusion in the Call-Off Contract	No input required.	Before the competition.