



# Apprenticeship Training Dynamic Marketplace

Customer guidance (RM6102)



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# Introduction

**This guidance has been produced by the Crown Commercial Service (CCS) to help you understand how to use the Apprenticeship Training Dynamic Marketplace (RM6102) via a Dynamic Purchasing System (DPS) known as Dynamic Marketplace.**

This guidance document covers:

- The scope of the Apprenticeship Training Dynamic Marketplace
- How to use the Apprenticeship Training Dynamic Marketplace and apply the rapid and standard award processes
- The information you need to provide when issuing a call for competition via the standard award process

The guidance provides you with the best practice approach to using the agreement. If you have a particularly complex requirement you may wish to seek additional advice from your own commercial team.

## **What is the Apprenticeship Training Dynamic Marketplace agreement?**

The Apprenticeship Training Dynamic Marketplace agreement has been established to enable central government, public and third sector organisations to buy apprenticeship training programmes inclusive of end point assessments or to buy independent end point assessments services, and related supplementary services.

This agreement enables buyers to access their levy funds to support their workforce planning strategies and meet their apprenticeship targets.

The principles and benefits of using the agreement are:

- Simpler quicker process
- A dynamic filtering system of the suppliers' offers along with access to their prospectus and pricing which gives the customer flexibility based on their requirements
- Agility to meet the government's and ESFA's needs in changes to the funding band rules; to existing apprenticeship standards and; to emerging apprenticeship standard development
- Ensures the supplier receives notifications of competitions that are relevant to their service offering
- Accessible route for the supplier to apply and register their interest and update the list of standards and associated services they can deliver (at any time)
- Supports localism and social value, enabling suppliers to bid for business locally, regionally or nationally

- Enables contract awards via shortlisting suppliers by use of filters for the standard award procedure to enable further competitions or through the use of filters along with supplier prospectus and pricing matrix(s) to determine Rapid Award
- Fully compliant with UK and EU regulations

The agreement can be used for any size of requirement, there is no minimum or maximum number of apprenticeship training programmes, or independent end point assessments or limits to the value of the supplementary services. You can select the areas of work you want to commission to produce a shortlist of suppliers; this enables you to select as broad or as specific range of suppliers as is appropriate for your requirement.

The distinct supplier filter categories comprise of the following:

- Services
  - Apprenticeship standards
  - End point assessment
- Delivery methods (i.e. classroom based; workplace based or blended delivery)
- Geographical location
- Personally identifiable information
- Cyber Essentials Basic/Cyber Essentials Plus
- Apprenticeship standard/ End Point Assessment Organisation (EPAO) specific prospectus

Customers have the option to procure supplier services via the following two routes:

- Standard export/ competition process and/or
- Rapid export/ competition process

Contracts must be awarded on the basis of most economically advantageous tender ("MEAT") from the point of view of the customer. Please refer to DMP Schedule 6: Award Criteria in the RM6102 Dynamic marketplace agreement v1 (watermarked) document which can be found on the website.

### Who can use the agreement?

This agreement can be used by all UK public sector bodies which includes:

- Central government departments, arm's length bodies and executive agencies
- Non departmental public bodies
- Devolved administrations
- NHS bodies
- Local authorities
- Charities
- Universities, colleges, schools, further education providers

The full list can be found in the OJEU notice, the link to this can be found on our website.

## Before you start

Before using this agreement you should ensure that you have registered for a manage apprenticeships account <https://accounts.manage-apprenticeships.service.gov.uk/service/index> in order to get government funding for training your apprentices.

You also need to ensure that you have agreed your procurement strategy.

Before accessing the Apprenticeship Training Dynamic Marketplace you can use the state of readiness checklist on our website to ensure that you are prepared and ready to contract with a supplier.

## The role of CCS

Our role is to provide you with advice and guidance to help you get the best out of the marketplace.

We manage the overarching Apprenticeship Training Dynamic Marketplace and the suppliers at the overarching agreement level. You are responsible for managing the contract with your appointed supplier. We can help with any issues you may have that require escalating.

If you have any other queries please email us at [info@crownccommercial.gov.uk](mailto:info@crownccommercial.gov.uk) or call our customer service desk on **0345 410 2222**.

## Scope of the Apprenticeship Training Marketplace

The Apprenticeship Training Dynamic Marketplace is a dynamic purchasing system (DPS). It allows customers to access products and services related to:

- Apprenticeship standards as per the 'APPROVED' standards listed on the Institute of Apprenticeships website [www.instituteforapprenticeships.org/apprenticeship-standards/](http://www.instituteforapprenticeships.org/apprenticeship-standards/)
- End point assessments (EPA) services from the Register of End Point Assessment Organisations (RoEPAO). These can be contracted via the training provider or independently. [www.gov.uk/guidance/register-of-end-point-assessment-organisations#register-of-end-point-assessment-organisations](http://www.gov.uk/guidance/register-of-end-point-assessment-organisations#register-of-end-point-assessment-organisations)
- Supplementary services that fall within the scope of the requirements of the agreement and which customers may require to deliver their apprenticeships schemes:
  - Delivery of apprenticeship training and management of the funding administration in accordance with the funding rules within the devolved administrations, either directly, or through training providers registered with the devolved administration
  - Supporting the sourcing, selection and assessment, recruitment and administration of the apprentices; including drafting job descriptions, attracting candidates, skills screening, long-listing and shortlisting, interview scheduling and references

- Bespoke, contextualise and/or package the apprenticeship learning to suit the specific needs of the apprentice and meet with the customer requirements
- Associated training related to the apprenticeship standard to support the development of the apprentice
- Providing advice, guidance and support and working with customers to establish the opportunity to co-invest in apprenticeships if there are insufficient funds in the customer's digital account.
- Additional services that are defined within ESFA Funding Rules as eligible or ineligible apprenticeship training costs for the purposes of apprenticeship levy funding
- Additional services that are defined within the ESFA Conditions for RoEPAO as eligible or ineligible EPA costs for the purposes of apprenticeship levy funding.

The DPS fulfils this requirement; upon application to join the DPS, suppliers indicate which elements and services they are able to bid for under the DPS. The elements are organised into a matrix of filters, comprising:

- Services
  - Apprenticeship Standards
  - End-point Assessments (EPA)
- Delivery Methods
- Geographical Location
- Personally Identifiable Information
- Cyber Essentials Basic/Cyber Essentials Plus
- Apprenticeship Standard/ /EPA specific Prospectus

## Enhancements to Apprenticeship Training Marketplace system

Enhancements to the system to allow for a full end to end service which includes:

- Fully digitised service to include awarding contract.
- Auto populating the order form with the winning supplier name, contracting authorities name and the standards used.
- Signing order form using DocuSign functionality.
- Cyber Essentials Plus filter
- Multi basket functionality – you can search for more than one standard at once.
- Built in controls to the system to allow users to have different permission levels.
- Flexible – you still have the option to complete the evaluation and documentation offline as currently available.

## Permissions

The permissions functionality has been developed in response to a number of bigger departments concerns over control management of selected users being able to enter into an online contract with a supplier. Your department will decide which option they wish to adopt for Apprenticeship Training Dynamic Marketplace system.

The default is all users are allocated both responder and validator permissions enabling them to carry out the full scope of the procurement activity as currently available.

## Who is on the Apprenticeship Training Marketplace?

We have a wide range of apprenticeship training and end point assessment providers on the Apprenticeship Training Dynamic Marketplace who are interested in working with the public sector.

New providers can apply to join the Apprenticeship Training Dynamic Marketplace at any time, where they identify the standards and/or end point assessments and/or supplementary services they specialise in as part of their supplier offer.

Once an application is complete, the process to assess and appoint a supplier to the Apprenticeship Training Dynamic Marketplace may take up to a maximum of 15 working days, but is often much shorter than this.

## CCS assurances of approved suppliers

All suppliers on the Apprenticeship Training Dynamic Marketplace are ESFA registered and/or registered on the Register of End Point Assessment Organisations.

The approved suppliers on the Apprenticeship Training Dynamic Marketplace, have provided responses to the Selection Questionnaire.

When customers have completed their call for competition on the Apprenticeship Training Dynamic Marketplace and intend to award to a supplier, they can request selection questionnaire evidence from the relevant supplier, and review.

**Financial standing** - we have tested appointed suppliers' financial standing at the point of them joining the Apprenticeship Training Marketplace, and will monitor them through the life of the Apprenticeship Training Dynamic Marketplace. A threshold Dunn and Bradstreet (D&B) score of 35 is set, so all appointed suppliers have met/

exceeded this threshold, or their accounts have been reviewed and sufficient financial assurance has been provided.

**Insurances** - In order to join the Apprenticeship Training Dynamic Marketplace, suppliers have confirmed that they comply with all statutory requirements for insurances.

Customers can determine levels and types of insurances they require as part of their contract, and test through competition.

**Cyber Essentials** - All suppliers on the Apprenticeship Training Dynamic Marketplace hold a valid Cyber Essentials Scheme Basic Certificate or equivalent. Evidence of this has been provided by the supplier. Some suppliers may hold a Cyber Essentials Scheme Plus Certificate which is also acceptable. Customers can request to see evidence once they have completed their call for competition.

**N.B** We have not mandated that suppliers provide all evidence up front, rather, they are self-certifying that they are able to meet the required standards. Customers can request to see evidence once they have completed their call for competition.

## How to access and the process

Appointing a supplier through the Apprenticeship Training Dynamic Marketplace includes the following key steps:

1. Choose your requirements
2. Choose the 'Access as a buyer' option via – the Supplier Registration Service (SRS) on the CCS website and sign in or register.
3. <https://supplierregistration.cabinetoffice.gov.uk/organisation/register>
4. You must accept and confirm at each log in your acceptance of the customer access agreement.

5. Create a new category portfolio to begin your supplier selection
6. Before going any further you must select the “Rapid” or “Standard” selection (definitions below)
7. At the beginning of the procurement/customer journey you must confirm and record your Statement of Requirements within the auto generated free text box
8. You can search for relevant suppliers from a range of filters and in accordance with your Statement of Requirements
  - a. Statement of Requirements. The list of suppliers will auto populate to display suppliers who match your criteria. For Rapid only - select a particular supplier to view their provider and/or training information.
  - b. Multi-basket - capability of searching for more than one apprenticeship standard.
9. Filters consist of a full range of services and delivery models. Suppliers can be filtered on locations and delivery methods.

Customers will have the option to procure supplier services via the following two routes:

- Standard export/ competition process and/or
- Rapid export/ competition process

View customer webinar for step by step guidance on how to use the system. This can be located on the CCS framework website <https://www.crowncommercial.gov.uk/agreements/RM6102>

### Rapid award procedure

This option allows the customer to use the service filters along with the suppliers’ prospectus and pricing in order to make a rapid award(s) to a supplier(s) who meets their service requirement(s).

You can search for relevant suppliers from a range of filters and in accordance with your statement of requirements.

Filters consist of a full range of services and delivery models. Suppliers can be filtered on locations and delivery methods including –

- Classroom based
- Workplace based
- Blended delivery
- Location (depending on relevant delivery method)

Once required filter options have been selected, you can save this category to progress with your selection and you will be able to export all relevant supplier data for the rapid application selection.

We have introduced additional functionality which allows users to select the successful supplier/s. Alternatively you still have the option to complete the evaluation and documentation offline as currently available to you.

Two options are available to you:

- Run a desktop evaluation on the system. See customer webinar for step by step guidance.
- Export all relevant supplier data for the rapid application selection

The supplier information in the export file\* will include a list of potential suppliers together with price information, the supplier prospectus and a short summary confirming general supplier and supplier identity information.

Each supplier prospectus will contain (but is not limited to)

- Supplier information
  - Apprenticeship training services
  - OFSTED link
  - Quality Assurance Agency (QAA) link (where applicable)
  - Office locations
- Supplier overview
  - Experience in apprenticeship training
- Additional services
  - Recruitment and administration support
  - Flexibility to bespoke
- Additional information
  - Industry recognition
  - Assurance certification
  - Security management system and control

\*Please note exported files older than 2 working days are deemed expired due to the continuous update of suppliers on the Apprenticeship Training Dynamic Marketplace. To update your portfolio access 'Manage your DMP category portfolio', use the 'Update' link to update your portfolio.

Customers will have the option to procure supplier services by applying the contract award criteria set out in DMP Schedule 5 – Award Criteria – Part B Rapid Award Process Competition. This is detailed below Contract Award Procedure – Rapid and Standard Award Process.

Customers have the option:

- Running your desktop evaluation on-line, award the contract, digitally signing.

OR

- With your exported file you will award the contract off line.

View customer webinar for step by step guidance on how to use the system. This can be located on the CCS framework website <https://www.crowncommercial.gov.uk/agreements/RM6102>

### Standard award procedure

This option allows customers to use the customer apprenticeships standards and service filters to select their specific service requirements. Customers can then export a supplier list and invite the selected suppliers to undertake a capability assessment and/ or to a competition within 2 working days of exporting the supplier list (\*as above). If the customer fails to invite selected suppliers within the 2 day period the customer will be required to use the service filters again and export a new supplier list.

As specified in the rapid award procedure you can search for relevant suppliers (under the standard award procedure) from a range of filters and in accordance with your statement of requirements.

You must at the beginning of the procurement/ customer journey confirm and record your statement of requirements within the auto generated free text box.

Once you have saved this category you can then export the related data for all suppliers included in your category portfolio. Once you have exported the supplier shortlist you can now progress with a

- call for competition.

\*Call for competition guidance can be found later on in this document

In preparation of awarding to a supplier you are able to request to view any documentation a supplier has confirmed they can provide as evidence in support of their Apprenticeship Training Dynamic Marketplace application.

To request to view evidence locate “Manage your DPS Category” portfolio screen and select request evidence on the related category portfolio – tick to confirm you understand and agree to the signature. The document includes guidance so you understand how to fill in the relevant sections.

You will then be directed to all suppliers included in your category portfolio.

For the related supplier select the “request evidence” link to view their documentation.

The supplier will now receive an email notification with a request to view their documentation or evidence.

Once the supplier accepts or denies this request you will receive a confirmation email.

### **Contract Award Procedure – Rapid and Standard Award Process**

You may award a contract with the supplier by sending (including electronically) a signed order form substantially in the form of the RM6102 Contract Order Form (Template RM6102 Contract Order Form and Template RM6102 Contract Terms). Both documents can be found on the RM6102 website page.

Rapid has the facility to award a contract through the DMP system including signing contracts using DocuSign. This functionality is only available if you have used the on-line facility to evaluate and communicate the award to the supplier.

On receipt of an order form the supplier accepts the contract by promptly signing and returning (including by electronic means) a copy of the order form back to you, the customer.

On receipt of the signed order form from the supplier, you need to send (including by electronic means) a written notice of receipt to the supplier within two (working days and a contract will then be formed.

Further guidance on publishing contract details for transparency please access the link below for further guidance. <https://www.gov.uk/government/publications/procurement-and-contracting-transparency-requirements-guidance>

### **Pre-market engagement (optional)**

You may find it useful to communicate with suppliers ahead of issuing your final specification by undertaking a pre-market engagement exercise. Please ensure this activity is undertaken in a fair and transparent way providing each supplier in your shortlist with an equal opportunity. This will allow you to further shape your specification, gather ideas on new innovative products and understand if there are any changes within the market that may influence your requirements.

If you decide to speak to the industry ahead of your call for competition, you must prepare an outline of your specification before you contact suppliers, this can be done using a draft specification. You will need to contact all the suppliers from your shortlist but you can choose how you contact them - for instance you can email them for information, invite them to an event or meeting to discuss your requirement or issue a formal request for information. This stage is for informal information gathering. If suppliers do not engage at this stage, don't assume that they do not want to participate. All suppliers shortlisted from your marketplace search should have the option to bid when you issue your call for competition.

## Call for competition guidance

You will need to amend or refine the RM6102 Contract Order Form (Template RM6102 Contract Order Form and Template RM6102 Contract Terms) to reflect your statement of requirements (only to the extent permitted by and in accordance with the requirements of the regulations and guidance).

You will need to invite tenders by conducting a call for competition procedure for your statement of requirements in accordance with the regulations and guidance.

You will then need to apply the competition award criteria (found in DMP Schedule 6: Award Criteria) to the suppliers' compliant tenders submitted through the call for competition procedure as the basis of your decision to award a contract for your statement of requirements

On the basis set out above, you must award your contract to the successful supplier and state:

- the goods and/or services requirements
- the tender submitted by the successful supplier
- state the charges payable for the goods and/or services requirements in accordance with the tender submitted by the successful supplier- incorporate the template contract form and template contract terms applicable to the goods and/or services
- provide unsuccessful suppliers with written feedback in relation to the reasons why their tenders were unsuccessful. You should provide constructive, written feedback to all participating suppliers and include a full breakdown of their scoring. Feedback comments should be objective and link back to the evaluation criteria. This will help suppliers understand how they can improve for future opportunities.

## Capability assessment (optional)

You can start your call for competition using a capability assessment stage, this will help you to identify which suppliers from your shortlist are going to be the most suitable. You may wish to run this process to refine your shortlist or to assess their capability of meeting your requirement.

You can use a series of yes and no questions that are mandatory for suppliers to pass to get to the written stage - you could, for example, use the ability to meet your stated deadline as a question. Please use questions that relate to key requirements only at this stage, and not those that you could score in the written stage.

You do not need to send the final specification to suppliers who have deselected themselves in a capability assessment unless you make material changes to the specification as a result of the exercise.

## Issue your specification

Your completed specification along with all other relevant documents, must be issued to all shortlisted suppliers, unless they have deselected themselves in a capability assessment. This can be done either via the CCS online procurement tool (eSourcing), your organisation's own procurement tool or by emailing suppliers. Please invite the contact listed in your exported shortlist to reach the right supplier contact.

Using a portal gives an auditable approach to the tender process. It is used to:

- Respond to clarification questions
- Track bid responses
- Send reminders to bidders
- Communicate to successful and unsuccessful suppliers
- Provide feedback to all parties

## Review proposals from suppliers

All suppliers will need to provide a written proposal in response to your specification. It is recommended that you assign three people to evaluate the proposals as this makes reaching an objective decision easier. Responses should not be discussed outside of the evaluation team and pricing information should be treated as commercially sensitive. Make sure that you maintain a fully documented audit trail of the results and final award decision, which will be useful when providing feedback to the participating suppliers.

Face-to-face presentation stage (optional) After reviewing written proposals, you may choose to invite suppliers with the best written response to present their proposal as an opportunity for face to face dialogue.

A face-to-face presentation will allow suppliers to present more detailed proposals and answer any specific questions you may have regarding their written response. It is also a great opportunity for you to meet the operational team and better understand the skills and expertise they will bring to your project.

If you decide to include a face-to-face presentation, you should outline from the outset of your call for competition how many suppliers you expect to invite, ideally three, and the criteria you are looking for and scoring them on. You should only invite suppliers who have a realistic chance of winning the competition to the presentation stage. The evaluation panel should prepare the structure of the meeting and it is recommended to share this with the shortlisted suppliers so that they are able to properly prepare.

Evaluation of presentations should form part of your overall quality score. The weighting for the presentation must be published in your call for competition from the outset. You should not repeat the questions asked in the initial written stage.

Your tender process should be proportionate to the value and complexity of your requirement. Suppliers will need a reasonable period of time to review and prepare a response. This includes allowing sufficient time for suppliers to ask clarification questions and consider your answers before the deadline for written responses.

## Evaluation criteria

You will need to decide in advance what information you need from suppliers and include this in your specification.

Rapid award process criteria must be linked to your requirements. Customers will evaluate the information provided within the filters and supplier prospectus and pricing matrix provided within the Apprenticeship Training Dynamic Marketplace.

Standard award process evaluation criteria must be linked to your requirements. This will allow suppliers to see how their proposals will be evaluated and the weightings that will be applied against the quality and price scores.

If you are including a presentation stage, you will need to allocate a percentage score for this stage. The weighting split between stage one (written) and stage two (presentation) will vary depending on the requirement, however you would expect to allocate a higher weighting for the first stage which includes quality and price elements. Please set different evaluation criteria for each stage and ensure the weightings for both stages add up to 100% of your quality score. Please specify the maximum number of suppliers you will invite to the presentation and/ or the minimum score mark in your specification. You must ensure that those invited to participate at the presentation (stage two) have sufficient written (stage one) scores to enable them to win the competition.

## Things to consider

### Stakeholder engagement

When establishing requirements you should engage early with internal colleagues including procurement, finance and legal to draw on their knowledge and experience and to gain their buy-in.

### Business case

Before procuring external support, a business case is usually required to demonstrate the need and to gain internal sign-off. It is your responsibility to ensure you have followed the correct procedure for gaining internal sign-off and follow your organisations procurement policy guidance.

### Statement of requirements

Your initial statement of requirements should be generated by using the filters on the marketplace.

The first step in a successful call-off contract is to establish exactly what services you require from a supplier, and to communicate the requirement clearly in the form of a statement of requirements.

Purpose of the statement of requirements:

- Create a contractual tool which forms an integral part of the call-off contract
- Forms part of a legally binding agreement which will be binding on both parties
- Inform the supplier(s) about the services required and enable them to propose a solution
- Facilitate effective contract management between you and the supplier
- Act as a reference in the case of any dispute between you and the supplier(s).

### Call-off contract

You will need to review all of the highlighted sections in the call-off contract and populate all necessary sections. Liaising with the successful supplier is advisable at this stage as both parties are required to sign the call-off contract.

You may wish to seek your own legal advice when drafting the call-off contract. CCS is not permitted to provide any legal advice.

You will have your own direct relationship with the supplier and will be responsible for managing the day-to-day operational activities.

### Writing your specification

The stronger the specification, the better the result. Focus on objective and provide any relevant information that will help suppliers to understand your requirement for apprenticeship training and/or end point advisors. It should be clear what you require and what your delivery lead times are.

## Get in Touch

If you need general advice about using Crown Commercial Service or further information please contact:

0345 410 2222

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[www.crowcommercial.gov.uk](http://www.crowcommercial.gov.uk)

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