

Digital Inclusion and Support DPS

RM6209



Customer guidance



Crown
Commercial
Service

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Introduction

This guidance has been produced by Crown Commercial Service (CCS) to help you understand what Digital Inclusion and Support (RM6209) is and how to use the Dynamic Purchasing System (DPS).

This guidance document covers:

- How to use the DPS to identify a supplier list
- What to include in your specification
- The information you need to provide when issuing a call for competition
- Managing your contract with your appointed supplier

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 Digital Inclusion and Support

The Digital Inclusion and Support DPS will provide central government and wider public sector departments the opportunity to find and procure a range of services relating to:

- Providing support to anyone who cannot access government's digital services independently, so that with assistance they can find helpful information and complete transactions for those services (Assisted Digital);
- Support users to gain the basic digital skills so that they can access government's digital services independently and go online to make the most of the internet (Digital Inclusion)

The framework builds on the existing commercial agreement RM3765 Digital Training and Support and focuses on the core service elements required by customers and does not overlap with existing Crown Commercial Service (CCS) offerings.

Digital Inclusion and Support is focused primarily on supporting our customers to access the experts in provision of these services, "doing the right thing" and to deliver social value outcomes, particularly inclusion and diversity.

The principal benefits of using the framework are:

- Gives freedom and flexibility to service owners such as government bodies and local authorities to define their requirements as outcomes that meet their assisted digital and/or digital inclusion users' needs
- Creates a competitive commercial environment in which all service providers have an equal opportunity to thrive
- Places the right value on service providers' capabilities and remunerates them accordingly
- Supports and encourages innovation and continuous improvement in service delivery
- Supports and encourages strong collaboration across all sectors: Central and local government, Wider public sector organisations, Private sector organisations (whether large, SME or micro suppliers), VCSE sector organisations

Who is on Digital Inclusion and Support

We have a wide range of organisations on the DPS who are interested in working with the public sector. New suppliers can apply to join the DPS at any time, and they identify the areas of work they specialise in as part of the application process. Once an application is complete, the process to assess and appoint a supplier to the DPS may take up to a maximum of 15 working days but is often much shorter than this.

Customers should use the filter system within the DPS to identify a shortlist of capable suppliers, and you may use as many of the filters as you wish. The short-listing process is described in Appointing a Supplier.

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
- Education, including universities, colleges, schools, academies, further education providers
- Fire and rescue
- Local authorities
- Police
- Not for profit (charitable) organisations
- Housing associations

Role of CCS

Our role is to provide you with advice and guidance to help you get the best outcome from the DPS. We can help with any queries you may have such as the best way to appoint a supplier and advice on structuring your evaluation criteria and how to structure your contract.

CCS manages the overarching DPS and the suppliers at agreement level. You are responsible for managing the contract with your appointed supplier. CCS is able to help with any issues you may have that require escalating, see Managing your contract and being a good customer for further details.

If CCS currently undertakes procurement activity on your behalf email info@crownccommercial.gov.uk to seek advice at the earliest opportunity.

If you have any other queries please email us at info@crownccommercial.gov.uk or call our Customer Service Desk on 0345 410 2222.

Basic Process

Appointing a supplier through Digital Inclusion and Support includes the following key steps:

1. Define your objective and the issues you are trying to address/solve
2. Develop your written specification with defined outcomes and deliverables
3. Use the DPS to obtain a supplier shortlist
4. Option of using a Capability Assessment to identify the suppliers that can meet your requirements
5. Issue your final specification, evaluation criteria and associated weightings to identified suppliers
6. Receive and evaluate written proposals from suppliers
7. Inform unsuccessful suppliers providing feedback and evaluation scores
8. Award the contract to the successful supplier and confirm the award to CCS

A timetable can be found in Annex 1 to provide an understanding of the general timescales, from the date of issuing your tender to contract award.

Before you Start

Getting approval to spend

Before using this agreement you should ensure that you have applied for and received the necessary budget approval and agreed your procurement strategy.

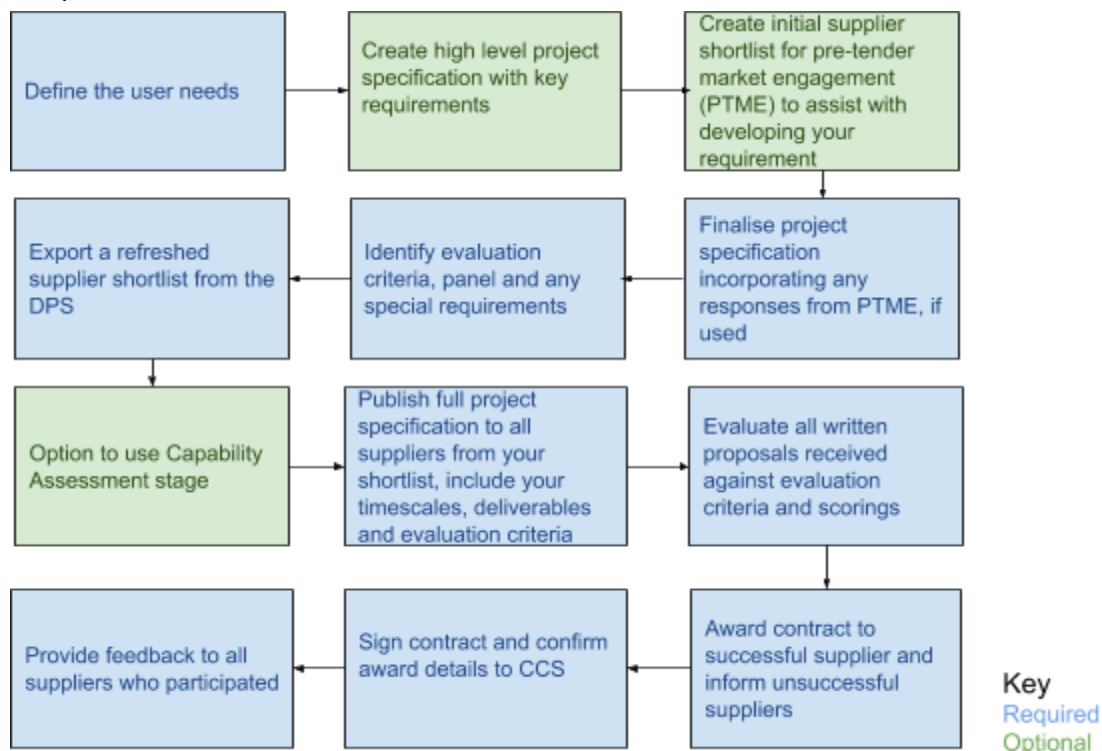
Allow sufficient time for proposals and evaluation

You should agree who will evaluate your shortlisted suppliers before you run a competition and build in enough time to evaluate the responses. Ideally, allow up to 6 - 8 weeks to complete the process, which is from the date of issuing your competition to contract award.

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.

Using the Dynamic Purchasing System

This flow diagram sets out the best practice approach to using the DPS, when running a further competition.



Defining the project objective

The first step to procuring a supplier is identifying what your user needs are, the services you need the supplier to solve/help with, along with the outcome required. SMART objectives are the best place to start, however not every issue will be so clear cut at this stage. The important points to establish are:

- The project objectives
- The target group/area for the project
- The role of technology innovation in meeting those objectives
- Any significant barriers to reaching this objective

Writing your specification

The stronger the specification, the better the result. Focus on the project objective and provide any relevant information that will help suppliers to understand your requirement and the outcome needed. It should include any relevant policies and standards that the project is looking to meet or that the supplier needs to adhere to should be clearly described, for example the Government Design Principles.

Evaluation criteria

You will need to decide in advance what information you need from suppliers and include this in your specification. 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. We recommend an 0-70% quality / 10-30% social value 20-80% price split, however you can choose the overall weightings and sub-criteria.

Pre-tender market engagement (optional but recommended)

You may find it useful to communicate with suppliers ahead of issuing your final specification by undertaking a pre-tender market engagement exercise. This phase is about ensuring that the market has a clear understanding of your requirements and to allow you to further shape your specification, gather ideas on new innovations and understand if there are any changes within the market that may influence your requirements.

Please ensure this activity is undertaken in a fair and transparent way providing each supplier in your shortlist with an equal opportunity. 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 a face-to-face or virtual event/meeting to discuss your requirement or issue a formal Request for Information.

This stage is for information gathering and to help refine your specification and / or requirements. If suppliers do not engage at this stage, don't assume that they do not want to participate. All suppliers shortlisted from your DPS search should have the option to bid when you issue your call for competition or capability assessment.

Dos and don'ts checklist:

Do

- ✓ Contact all suppliers from your shortlist
- ✓ Provide a reasonable time limit to email requests to make sure suppliers know when they need to respond by
- ✓ Keep an audit trail of all communication

Don't

- ✗ Limit contact to suppliers that you know
- ✗ Contact suppliers in different ways; each supplier should be given an equal opportunity to respond (i.e. don't email some suppliers and phone others to discuss your requirements)
- ✗ Forget that all suppliers can bid when you issue your final specification

Appointing a supplier

This section covers the process on how to invite suppliers to your call for competition. You should engage with your procurement function prior to making any contact with suppliers.

1. Obtain a supplier shortlist from the DPS

1.	Register or log-in to the DPS
2.	Navigate to Digital Inclusion and Support
3.	Choose the 'Access as a buyer' option and confirm your acceptance of the customer access agreement
4.	Click on 'create new category export' and use the filters to reflect your specification and create your supplier shortlist
5.	Save your filtered shortlist by clicking on 'Save category' and give the shortlist a unique name specific to your competition. Export the list of suppliers from the DPS
6.	Invite all the suppliers on the shortlist to a call for competition

We recommended that the exported supplier list is used within 2 working days, as new suppliers may be added at any point, thus changing the list of suppliers eligible to compete. Please refresh your final list as necessary.

2. 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 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.

3. 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 your organisation's own procurement tool, by emailing suppliers or the CCS online procurement tool (eSourcing), further information on using CCS' portal [eSourcing user guidance](#) can be found here. 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

Dos and don'ts checklist:

Do:

- ✓ State that the competition is being run through CCS Digital Inclusion and Support (RM6209) at the start of competition documents
- ✓ Provide a clarification period for suppliers to ask questions
- ✓ Specify any particular requirements that need to be fulfilled
- ✓ Provide a clear deadline for responses
- ✓ State whether there will be a face-to-face presentation and what format this will take
- ✓ Make sure that your requirements, documentation and evaluation are proportionate to the value and complexity of your specification
- ✓ Ensure suppliers have equal access to information during the competition process and publish all responses to questions asked or clarifications raised to all suppliers involved
- ✓ Provide feedback to all parties

Don't:

- ✗ Be overly prescriptive, give the supplier space to propose an innovative solution
- ✗ Use acronyms or civil service terminology - use plain English
- ✗ Overwhelm the reader with excessive data
- ✗ Forget to disclose any conflict of interest issues you may have in your specification

4. Review proposals from suppliers

All suppliers will need to provide a written proposal in response to your specification. It is recommended that you assign 3 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.

5. Awarding the contract

As part of your compliance check before awarding your contract, you have the option to request evidence of insurance and cyber certificates provided by the suppliers on the DPS. To do this, you will need to log-in to the DPS and navigate back to your saved search. Find the supplier(s) you wish to see further information for and click on 'see evidence'. The suppliers will then be sent a notification and will give you access to see the evidence.

Following the successful completion of your competition evaluation you can now award a contract to the successful supplier. Once you have the relevant internal approvals in place you can notify all participating suppliers of the outcome. A standstill period is not mandatory, but is recommended, particularly for high value contracts, to address any supplier challenges or issues raised.

You **must** use the Order Form to create your contract, which is aligned to the contract terms set out in the agreement. There are some sections of this contract that you can alter depending on your organisation and requirements. The Order Form must be completed by the customer prior to being sent to the supplier for signature. The document includes guidance so you understand how to fill in the relevant sections.

Once your contract has been signed, please send your award details to info@crowcommercial.gov.uk, including:

- Contract name
- Contract length (including any extension options)
- Contract total value
- Winning supplier name

Please remember to fulfil your organisation's transparency requirements and publish details of your award on [Contracts Finder](#), where necessary. (Customers need to sign-in via the link in the top right corner in order to post details). The Procurement Policy Note relating to the use of Contracts Finder can be found [here](#).

6. Provide feedback to suppliers

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.

Electronic Reverse Auction

You also have the option to run an Electronic Reverse Auction, for further information on how to run this, please contact the team: info@crownccommercial.gov.uk.

Managing your contract and being a good customer

For customers using the Digital Inclusion and Support DPS we recommend a relationship based on partnership with our suppliers. A collaborative approach will allow you to make the best use of their knowledge and expertise to help you to get the best outcome from the services they provide.

Your obligations as customers

There are a number of obligations you have as customers. These include:

Providing a clear specification setting out your requirements (services and deliverables) and timelines of each phase of work:

- Communicating with your supplier on a regular basis to discuss progress
- Promptly addressing any issues with your supplier
- Agreeing at the start of the project how frequently you expect to receive reports from your supplier, this should be in line with the requirements in your specification
- Pay your supplier within 30 days on receipt of an undisputed invoice. Check invoices against the rates and deliverables agreed in your contract

You should be able to rely on your supplier to give you expert advice and consultation that comes from its collective wisdom and experience. The supplier will explain their strategy, offer honest advice and acknowledge when the topic has shifted outside of their expertise. As a customer, you should also proactively advise the supplier on anything it needs to know to deliver the best results.

How to manage issues

By ensuring you have regular communication with your supplier you should be able to avoid any issues. In the event that you do experience performance issues with your supplier, you should take the following steps to address the issue as quickly as possible.

1. Raise the issue with your supplier lead and / or commissioner lead as soon as possible
2. Clearly set out your concerns and agree a plan of action with the supplier including a deadline for resolution - put in place more frequent status updates if necessary
3. If the issue is not resolved by the agreed deadline, escalate the matter internally and to supplier directors

4. If the issue is not resolved by the agreed deadline, contact the CCS DPS manager to notify them and agree next steps
5. If you have carried out all reasonable steps to rectify the issue, allowed time for recourse and are still not satisfied, then you will need to decide how to resolve the issue with internal colleagues and CCS.

Annex 1

Timetable for appointing a supplier

The timetable below provides an example of the timescales that are involved in a call for competition, from the date of issuing your tender to contract award. Please engage with your commercial function when planning the timetable.

You should allow up to 5 weeks if you choose all recommended options. You may require more time for more complex, high value projects.

			Timescales	
Task	Required/ Optional	Task owner	Working days	Weeks
Tender issued	Required	Customer	Day 1	Week 1
Deadline for submission of Capability Assessment	Optional	Supplier	Day 4 - 5	Week 1
Evaluation of Capability Assessment	Optional	Customer	Day 6 - 7	Week 2
Shortlisted agencies from Capability Assessment notified	Optional	Customer	Day 7 - 8	Week 2
Deadline for the submission of clarification questions	Required	Supplier	Day 11	Week 3
Deadline for response to clarification questions	Required	Customer	Day 12 - 13	Week 3
Deadline for submission of proposals	Required	Supplier	Day 16 - 17	Week 4/5
Evaluation of proposals	Required	Customer	Day 18 - 21	Week 4/5
Award contract and provide feedback to unsuccessful supplier	Required	Customer	Day 22	Week 5
Project Inception Meeting	Required	Customer and supplier	Day 25	Week 5

Annex 2

Specification writing guidance

Drafting an outcome based specification

The section will take you through the following areas of developing your supplier project specification.

A good specification should include all of the following:

1. Title

This notifies the reader of the focus of the project.

2. Summary

Use this section to set out the nature of the issue and the project specification to the supplier. The supplier should be able to use the summary to decide whether it would be appropriate for them to bid for your work.

Make sure you cover:

- A clear and specific description of the problem, explaining why the project is needed
- A short summary of your objectives
- Any mandatory service standards or policy requirement e.g. Government Digital Service Standards or particular project outputs
- Who the end customer is (e.g. are multiple central departments going to use the technology, will it be citizen facing?)
- Expected project length

3. Background to the issue

Use this section to provide detailed information on the background to the project. Make sure you cover:

- Outline the issue the project relates to
- Explain who you are as a customer - don't assume the supplier knows your department/organisation
- Set out any campaign or policy information the supplier needs to understand
- Provide data, existing research and any useful links

4. Project objectives

What is the aim of the project? This should be clear-cut, detailing the overall objectives plus a bullet point list of specific objectives. If you already have SMART objectives you should include these here.

5. Suggested approach and analysis

Use this section to explain your proposed approach (if you have one). If you do have an existing approach you should be very clear where/if you are seeking new ideas. The project specification should encourage suppliers to problem solve rather than being prescriptive in its strategy. You should be clear in this case that you wish the supplier to develop the approach and what it needs to consider in doing so. Make a clear statement of the type and complexity of analysis needed. Be sure to specify requirements for any sub-contracting, if you have any.

6. Outputs

The deliverables required, expanding on the high level outputs – such as any data, reports, any service levels and KPIs. Detail frequency of any reporting.

7. Liaison and governance arrangements

The requirements for contact and liaison throughout the project. Is there a team or advisory group the supplier will need to meet? What are the envisaged frequency, type and reporting details required?

8. Timings

Give dates for awarding the contract, completion of the project – and any interim deadlines. This will help in the planning of what is feasible e.g. the successful supplier will be notified by [date]. A project set-up meeting is scheduled at [department] for [date]. We require the project / service to be complete and operational by [date]. Key Performance Indicators (KPIs), used to help you measure how well progress is being made towards a project or business objective

9. Form of proposal

A clear statement of how the proposal should be presented. This might include a list of headings for the proposal, the order of the headings and the detail required. e.g. a proposal of a maximum of eight pages is required by [date]. Project team CVs can be included as an appendix, along with any additional company information you think is relevant.

The proposal should contain the following:

- A succinct summary of the proposal
- Details of the approach and the technologies to be used in support of this work, including your rationale for choosing this approach
- A demonstrable understanding of required outcomes [and sector]
- Your organization's experience of similar projects and [relevant] capability
- Arrangements for managing this work and quality assuring outputs, including how you would like to work with the customer during the project
- A detailed budget / costing, including a breakdown of time and costs per activity and per team member

10. Evaluation criteria

The basis on which the contract will be awarded including the weightings of the sections / questions.

The criteria could include;

- Suitability of methodology
- Experience in the area
- Evidence of understanding the brief
- Whole life costs

Annex 3

Document checklist before issuing your call for competition

- State RM6209 Digital Inclusion and Support at the start of your competition document
- Tender timetable which sets out the high level stages of the process and when you intend to award and start the contract
- Tender timetable include dates for the clarification period, when suppliers have to ask questions by, and when you will provide responses.
- Detail on the process and evaluation of the Capability Assessment stage (if used)
- Detail on the process, evaluation and weighting of written proposals
- Appendices (if used)
- Draft letter of appointment and contract terms
- Tendering instructions (details on the submission process specific to your organisation)
- Procurement tool registration details (if inviting suppliers to your organisation's own portal)

Further information

If you require any further information please contact

info@crowncommercial.gov.uk

0345 410 222

You can also learn more about Crown Commercial Service at:

Website:

crowncommercial.gov.uk

Twitter:

[@gov_procurement](https://twitter.com/gov_procurement)

LinkedIn:

[Crown Commercial Service](https://www.linkedin.com/company/crown-commercial-service)