



London Procurement Partnership

Commercial advantage for the NHS by the NHS



Estates, Facilities & Professional Services

Analysis and Reconciliation Services Framework User Guide

Framework Reference Number: 2015002NC

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1. Introduction

This user guide is intended to provide information about the Analysis and Reconciliation Services framework and to provide practical support to contracting authorities who wish to access the framework to award contracts.

Please note that the guidance provided within this document only applies to this framework and contracting authorities should ensure they refer to the guidance document which is relevant to the framework they wish to access to ensure that the right processes are being followed.

Procurement teams should be involved in the decision to access the framework to ensure that the decision fits with local procurement policies and contracting authorities' standing financial instructions.

1.1 Key Information

Framework Title	Analysis and Reconciliation Services
OJEU Reference Number	2015/S 227-413650
LPP Reference Number	2015002NC
Framework Period	1 st March 2016 to 28 th February 2019
Extensions	One further 12 month extension period available

1.2 Background

Despite purchase to pay controls and invoice approval processes, errors in suppliers' charges for services and goods often go undetected, resulting in unnecessary and wasted expenditure.

Following the success of the 2012-15 Analysis and Reconciliation Framework in the East of England, which realised savings in the region of £9 million for NHS Trusts, the Hub retendered a new framework agreement following a full OJEU open process.

The new framework is open to all Trusts served by the NHS Collaborative Procurement Partnership (CPP), which is a strategic partnership between the East of England Collaborative Procurement Hub, NHS Commercial Solutions, the NHS London Procurement Partnership and the North of England Collaborative Procurement Partnership. The contract is also open to other NHS and Public sector organisations throughout the UK subject to agreement from East of England Collaborative Procurement Hub. The framework allows organisations the option to either directly award to appointed suppliers or carry out further competitions.

The 3 year framework was let on 1st March 2016 and is available immediately for Trusts to use. The framework will run to 28th February 2019. There is one further one year extension period available which if it were invoked would take the framework expiry to 28th February 2020.

1.3 Overview

The framework incorporates the following seven lots:

- Lot 1: Telecommunications
- Lot 2: Energy – Electricity and Gas
- Lot 3: Water
- Lot 4: Value Added Tax
- Lot 5: Estates
- Lot 6: Accounts Payable
- Lot 7: Temporary Staffing

Under the framework agreement, the service providers will undertake an in-depth audit of the Trusts financial records for the Lot(s) agreed, identify savings available and make the recovery on behalf of the Trust. These savings could be from application of rates being outside of contractual agreements, identification of duplicated charges on invoices, failure to apply discounts/rebates, incorrect fees or margins, inappropriate or overstated third party costs or service credits not being paid.

The framework covers the following services:

- **Lot 1 Telecommunications**

Direct and in-direct lines, Mobile networks & data circuits

- a. Identify overcharging / incorrect application of tariff
- b. Redundant services (lines, maintenance etc.)
- c. Call abuse
- d. Unusual calling patterns
- e. Redundant assets / services
- f. Provide analysis of new tariff proposals (Saving Forecast)
- g. Identify weaknesses in Trust processes that lead to the above
- h. Invoice/bill validation and or on-line self-bill validation services

- **Lot 2 Energy**

Electricity/ Gas/ Oil/ Coal/ Renewable Energy & CRC/ Emissions

- a. Verify correct tariffs have been applied
- b. Identify overcharging/ incorrect application of tariff
- c. Identify errors in other charges which make up the energy invoice
- d. Site process and load shape
- e. Voltage level

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- f. Check and validate site bandings
- g. Check consumption rates – identify variances
- h. Advise on the benefits of energy profiles based on historic data
- i. Identify weaknesses in Trust processes that lead to the above
- j. Advise Trusts on monitoring and targeting CRC reduction target
- k. Invoice/bill validation and or on-line self bill validation services

- **Lot 3 Water**

- a. Invoice/bill validation & on-line self-bill validation services that may enable and aid processes (for example) the recovery of overcharges leading to the reduction of Water usage including:-
- b. Identification of overcharging/ incorrect application of tariffs
- c. Excessive Water Consumption
- d. Sewerage abatement issues
- e. Non return to sewer allowance issues
- f. Metering sizing issues
- g. Water drainage and trade effluent issues
- h. Retrospective Analysis (up to 6 years) of bills to identify if any retrospective rebates can be reclaimed
- i. Water Conservation Services and Consultancy Services for Water Management
- j. Installation of Water Saving Equipment and Installation of Automatic Water Metering equipment (AMR)
- k. Installation of Sub Meters
- l. Borehole installation opportunities
- m. Water monitoring services

- **Lot 4 VAT**

- a. Identifying under claims
- b. Identify any over claims to reduce the risk of penalties
- c. Identifying payment duplication
- d. Identify opportunities to 'reclassify', in order to reduce VAT costs
- e. Identify any other VAT related savings
- f. Identify weaknesses in Trust processes that lead to the above
- g. Advise trust on strategy's to reduce the overall VAT bill

- **Lot 5 Estates**

Rents and rates reviews

- a. Check historical rent and rate demands for accuracy and recover any overpayments on the Trusts behalf
- b. Check and appeal any rateable value discrepancies, with a view to both recovering excess payments, and lowering future liabilities.

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- c. Checking transitional adjustment, in-order to establish any change to the rateable value that may have been proposed by the valuation officer.
- d. Identify weaknesses in Trust processes that lead to the above
- e. Identifying voids to receive the empty rate liability, ensure correct amount of interest is payable on refunds received
- f. Checking transitional adjustment, in order to establish any change to the rateable value that may have been proposed by the valuation officer.
- g. Identify weaknesses in Trust processes that lead to the above

- **Lot 6 Accounts Payable**

- a. Identify overcharging
- b. Payment duplication
- c. Identify weaknesses in Trust processes that lead to the above

- **Lot 7 Temporary Staffing**

- a. Identify and recover overcharging (margins/agreed hourly rates etc.)
- b. Identify and recover duplication
- c. Identify weaknesses in Trust processes that lead to the above

1.4 Expected Benefits

Financial Benefits

Savings are achieved through immediate identification and correction of errors which may result in financial recovery.

Other Benefits

Having followed the process required under the EU Procurement Directives, this framework provides Contracting Authorities with a legally compliant access to the market, with the benefits of significantly reduced procurement timescales and access to cost-effective and quality approved suppliers.

Through the identification of strengths and weaknesses the contracting authority will be able to make long term sustainable financial and non-financial benefits resulting from process and control improvements:

- Staff training
- Cultural change with buy in into improved procurement, data recording and management, accountability and budgetary controls, and approval processes
- Improved Supplier management and relationship
- Reduction in error rates and duplications
- Deliver immediate cash savings on a no win no fee basis
- Enhance operational control and efficiency
- Provide high value audit reporting over payment and purchasing operations

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- Provide key performance metrics and benchmarking
- Save time and effort required for tendering any of the services under this agreement
- Provide a fully EU compliant framework
- Consistent terms & conditions of contract
- Opportunity for further savings through further competition

1.5 Awarding a Contract

To award a contract under this framework the contracting authority must complete and submit a Customer Access Agreement (CAA) (Appendix D) to LPP. The contracting authority then has the option of Direct Order/ Call Off or further mini-competition.

Instructions on how to access the framework and undertake a call off/ mini competition are contained in section 4 below.

2. Management of the Framework Agreement

2.1 Framework Contracts

All suppliers who have been awarded a position on this framework have signed framework contracts with East of England NHS Collaborative Procurement Hub (EOECPH). EOECPH is responsible for the management of the framework contracts and will seek feedback from contracting authorities to ensure maximum value is derived from the framework.

2.2 Activity Based Income (ABI)

This framework has been established with an Activity Based Income (ABI) charge of 5%. Each supplier will pay the ABI charge for all contracts awarded under the framework. Any pricing provided by suppliers will be inclusive of this charge.

2.3 Management Information

LPP/ EOECPH will collect on monthly basis management information from each supplier for each contract they have been awarded under the framework. The management information will allow the category manager to have an overview of the supplier performance on specific contracts.

2.4 Framework Manager

Contracting authorities who have any questions regarding the framework should contact the framework manager in the first instance. This is the person identified on page 2 of this document.

2.5 Business Continuity Plans

As part of the supplier's application to be on the framework they have submitted to EOECPH generic business continuity plans. These have been reviewed and scored as part of the evaluation of the framework award. LPP strongly suggests that contracting authorities request as part of their mini competition specific business continuity plans relating to their service and location so these can be retained for the successful contractor.

3. Accessing the Framework

3.1 Framework Access

This framework is open to all public sector bodies on receipt of a signed access agreement.

3.2 Benefits of Accessing a Framework

There are a number of benefits of awarding contracts under a framework, these include:

- It is faster and less onerous than a full OJEU tender process.
- There is no need to assess framework suppliers against criteria such as financial standing or business probity as these have been assessed during the PQQ stage of the framework establishment.
- By using the framework there is no need for you to separately advertise your requirement.
- The framework is based on generic service specifications which contracting authorities can adapt to meet their specific requirements.
- The terms and conditions of the framework agreement and call off contracts have already been agreed with all framework suppliers therefore no further legal dialogue is required.
- By following these guidelines you can ensure that you are adhering to EU Procurement legislation.

3.3 Framework Access Charge

There is no charge for contracting authorities who are members of NHS Commercial Alliance or LPP to access this framework agreement, the only charge is the ABI charge from the contracted supplier.

Appendix C sets out the key responsibilities of each party during the framework call-off/mini competition process. Should a contracting authority wish for LPP to provide additional support, over and above what is shown in this document, in awarding a contract then LPP reserves the right to charge for these additional services. This will be discussed and agreed with each contracting authority on a case by case basis.

3.4 Framework Access Agreement

Contracting authorities wishing to access this framework should complete the Customer Access Agreement (CAA) in Appendix D and send this to the category manager. Once this has been completed the category manager will provide the contracting authority with access to the mini competition documents and advise the suppliers on the framework that the access agreement has been signed. Suppliers on the framework will not enter contracts under this framework with any contracting authority until the category manager has confirmed a signed access agreement is in place.

4. Running a Mini-Competition or Call-Off

4.1 Establishing a Project Team

Contracting authorities will need to establish a project team which is responsible for supporting the award of the new contract. This project team should include key stakeholders from across the organisation who can input into the specification and evaluate the quality of responses from suppliers under the framework.

The project team should be supported by a project lead who is responsible for ensuring the project is supported by the contracting authority's board and managing the implementation of the new contract.

LPP will liaise with the project lead as per the responsibilities matrix in Appendix B. If the contracting authority does not have the resource to undertake this internally then LPP can provide support but this may come at an additional cost. If this is required then you should contact the category manager to discuss further.

4.2 Key Decisions and Actions

By deciding to award a contract under the framework agreement much of the hard work has already been completed which should save the contracting authority time and money. A suite of mini-competition documents is available which can be tailored by the contracting authority to meet their specific requirements.

Once deciding to contract under the framework agreement, the contracting authority must decide whether to:

- a) Undertake Direct order / Call off
- b) Undertake a mini-competition

The key decisions and actions which will need to be completed by the contracting authority to award a contract under the framework are set out in the responsibilities matrix in Appendix C.

It is the contracting authority's responsibility to validate the data being sent out as part of the mini competition, check the evaluation of all bids and award the contract under the framework.

4.3 Undertaking a Direct Call Off

If a Participating Authority wishes to source Services through the Framework Agreement it shall first determine from:

- i. Information supplied by the Service Suppliers (whether incorporated in their responses to the Bid or otherwise);
- ii. Information publically available (including through the Service Suppliers own web-sites, legal directories or elsewhere); and

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- iii. Information shared between the Authority and the Procuring Authorities
- iv. Which Service Suppliers are capable of providing the Service Requirements

The Participating Authority may then choose a capable Service Supplier with whom to place an Order in the following way:

By choosing the Service Supplier who demonstrably offers best value for money for its requirement when judged against the criteria of:

- i. Speed of service commencement, (including, without limitation, capacity to meet required deadlines and, where relevant, geographical location);
- ii. Quality (including as appropriate: capability, expertise, past performance, prior commercial intelligence, availability of resources and proposed methods of undertaking the work); or
- iii. Price;

4.4 Undertaking a Mini Competition

If a Participating Authority is unable to determine which Service Suppliers are capable of providing the (Services) to their specific requirements using the procedure above it may do so by consulting in writing to all of the Service Suppliers within the relevant Lot and inviting them within a specified time limit, to submit a Bid in writing for each specific contract to be awarded and by choosing the one which offers best value for money following the process detailed below:

Any Participating Authority ordering Services under this Framework Agreement through a further competition may:

- (i) Adopt the criteria set out above when developing its Statement of Requirements for the Services and identify the Service Suppliers capable of supplying the Services;
- (ii) Wish to evaluate a 100% on a single criteria such as a 100% on Commercial or a 100% on Technical, if this is the primary or only factor from the evaluation criteria which is applicable to their local needs, this flexibility is included as part of further competition which may be carried out applicable to the contract.
- (iii) Refine the Call-Off Terms to reflect its Service Requirements for example, the Statement of Requirements for the further competition may reflect not only the need to secure Analysis and Reconciliation Services but also seek to reflect the Contracting Authority's requirements to place a greater emphasis on the commercial

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requirements, providing assurance to the Business Objectives of the Contracting Authority.

Any Contracting Authority can invite Bids by conducting a further-competition for its Services Requirements and in particular the Contracting Authority shall:

- (iv) Invite the Service Suppliers to develop a proposed statement of work setting out their respective proposals in respect of such Participating Authority's Statement of Requirements and invite the Service Suppliers to submit a Bid in writing for each specific contract to be awarded by giving written notice in e-mail to the relevant Service Supplier Representative of each Framework Service Supplier;
- (v) Set a time limit for the receipt by it of the Bids which takes into account factors such as the complexity of the subject matter of the contract and the time needed to submit Bids; and
- (vi) Keep each Bid confidential until the time limit agreed by the Parties has expired;
- (vii) Apply the criteria set out above to the Service Suppliers compliant Bids submitted through the further competition as the basis of its decision to award a Call-Off Agreement for its Service Requirements;
- (viii) On the basis set out above, award its Service Requirements by placing an Order with the successful Service Supplier which:
 - (A) States the Service Requirement
 - (B) States the Statement of Work submitted by the Service Supplier;
 - (C) Speed of available response, (including, without limitation, capacity to trust requirements and, where relevant, geographical location);
 - (D) Quality (including expertise, and proposed methods or undertaking the work;
- (ix) Provide unsuccessful Service Suppliers with feedback in relation to the reasons why their Bids were unsuccessful

The Service Supplier shall ensure that any prices submitted in relation to a further competition held pursuant to the above methodologies shall be based on the prices and costs as set out in the ITT Commercial Schedule and take into account, any discount to which the Participating Authority may be entitled to as set out in the ITT Commercial Schedule.

To undertake a mini competition within the framework the contracting authority should refer to the responsibilities matrix in Appendix C and complete the Customer Access Agreement (CAA) in Appendix D. Once this is received by LPP access to the mini competition documents will be provided through my.lpp to registered users.

The information which is required from the contracting authority in each document is:

1. Mini Competition Instructions

This document sets out the instructions for the bidders on how to complete and respond to the mini competition. As a minimum the contracting authority will need to insert its award criteria against the stated headings, enter the contract period and complete the project plan. Contracting authorities using their own e-procurement systems to run the mini-competition will need to change the instructions to reflect their own systems.

2. Abstract of Particulars

This document provides bidders with an introduction to the contracting authority. An outline to the contracting authority and its main areas of service provision should be provided as well as an overview of the current contracting arrangements. Any specific aims and objectives from a new contract should be given here so bidders can understand how best to structure their response to meet your requirements. Any known changes to service provision which may affect the contract should be stated.

3. ITT Questions

This document identifies the questions that you will be asking bidders to respond to. Suggested wording has been provided in this document. Contracting authorities may replace these questions with their own, amend the suggested questions or keep them as they are as part of the mini competition. All questions should clearly show how they are linked to the award criteria and any word limits that bidders will be asked to adhere to. Remember you should not re-evaluate areas already evaluated at PQQ stage, such as financial standing.

4. Specification

Template specifications have been provided for use by the contracting authority. All suppliers on the framework have seen these template specifications as part of their application to be on the framework. Contracting authorities should use these documents as a guide to structure their own specifications.

5. Pricing Schedule

A pricing schedule template exists which provides a consistent format for bidders to present their pricing as part of the mini competition. However you should review the template(s) to ensure that it captures all the areas relevant to your trust and that you are clear how you will evaluate the responses received.

6. Terms and Conditions of Contract

The terms and conditions of contract have been agreed with all suppliers as part of their award onto the framework. Contracting authorities may make changes to these terms and conditions but they should be minor changes and highlighted clearly in the document so all bidders are aware changes have been made. When setting response deadlines to the mini-competition additional time should be provided by contracting authorities where changes have been made to the terms and conditions so that all bidders have the opportunity to raise these changes with their legal teams.

7. Signed Document Set

All bidders are required to complete and sign this set of documentation. Contracting authorities should ensure that the tender invitation date and title are changed to reflect their mini-competition.

8. Additional Information

Where additional information is available to support the bidders in submitting their responses this should be provided here.

9. Evaluation Template

This document brings together the evaluation criteria, question scoring and questions into a document that can be used by the evaluation panel to score the responses. The contracting authority should select from the drop down list the score which is to be given for each response and insert a comment as to why that score has been provided. The scores and the comments will then be used to feedback to all bidders on the outcome of the mini-competition.

10. Standstill Award Letters

- Contracting authorities should complete and issue these letters once they are in a position to award the contract. This letter will start the ten day stand still period giving all bidders an opportunity to request further information before the contract is formally awarded. The standstill period should finish at midnight once ten full calendar days have passed. If the tenth day finishes on a weekend or bank holiday this should be extended to midnight on the next working day. Contracting authorities should use the information within the completed evaluation document to complete the standstill letters. The letters should also be customised to reflect the mini-competition details and the contracting authority's process for appeal or request for further information.

Once mini competition documents 1-8 are completed they can be issued to all of the suppliers under the relevant lot. A list of suppliers and their contact details is provided in Appendix A. If the contracting authority prefers for LPP to release the mini competition documents through their e-tendering portal the mini competition documents should be sent to the category manager. Suppliers should be given adequate time to respond to a mini competition. Site visits should be provided to all suppliers during the mini competition process and any clarification questions should be answered as swiftly as possible.

The mini competition documents will be returned by the suppliers and should be evaluated by the project team in line with the evaluation criteria which was set out within the invitation to tender. As part of the evaluation process supplier presentations may be undertaken. Suppliers should be provided with adequate time to prepare their presentations and should be given a clear brief of what to present.

Once the evaluation process is completed the contracting authority should notify all suppliers of the outcome of the mini competition and start a 10 day stand still period before concluding the contract.

4.5 Evaluation Criteria

The following evaluation criteria were set out within the framework agreement: -

Technical and Quality Evaluation – 40%

- Commercial Evaluation – 60%

This was broken down as follows:

Quality (40% Weighting)

Specification Heading	Sub weighting	Maximum Number of Points Available
Service Overview	15%	10
Implementation	15%	10
Recovery	15%	10
Reporting & Management Information	10%	10
Marketing	5%	10
Customer Services & Account Management	10%	10
Data Compliance	10%	10
Core Audit and Recovery Service	20%	30
TOTAL TECHNICAL POINTS AVAILABLE		100

Participating Authorities may adjust the evaluation weightings, sub-criteria and the sub-criteria weightings to meet local requirements, as long as these are clearly stated to all suppliers at the start of the mini competition process. Participating Authorities may also include a presentation/interview in to the evaluation which may or may not be scored.

Commercial (60% Weighting)

Weighting		Sub-weighting	Maximum Points Available
Commercial – Weighting - 60%	1st Pass	30%	100
	2nd Pass	30%	100
	On-going	30%	100
	Innovative pricing	10%	2
	TOTAL COMMERCIAL POINTS AVAILABLE		302

4.6 Transition, Planning and Support

As part of the mini-competition or call off process the successful supplier should provide you with a transition plan which clearly explains what tasks need to be undertaken and who is responsible for ensuring they are completed. This plan should set out the level of resource which is required from the contracting authority during the transition process. The expected timescales for each stage of the transition and the mobilisation as a whole should be shown. The contracting authority should review the suppliers performance against the plan on a regular basis throughout the transition.

4.7 Managing the Contract

The contracting authority should hold regular meetings with the supplier to review performance against agreed key performance indicators. Should the supplier fail to meet the agreed key performance indicators then the contracting authority should look to take corrective action as outlined within the contract document. The LPP category manager should be made aware of repeated failures in a supplier's performance and can be asked by the contracting authority to support rectifying issues.

4.8 Key Performance Indicators

LPP encourages the use of key performance indicators within contracts as a way of monitoring and managing supplier performance. Some suggested key performance indicators which are relevant to this contract have been included within the template specification document. Contracting authorities should ensure these meet their requirements and if necessary personalise them to ensure they do.

Key performance indicators should not be used to punish a supplier but should be built in to encourage and reward high quality performance of the contract. As such LPP suggests that key performance indicators are established which are achievable and agreed by both parties.

5. Frequently Asked Questions

5.1 What is a Framework and is it compulsory to join?

A framework is a general term for an agreement with a provider(s) which sets out terms and conditions under which specific purchases (call-offs) can be made throughout the term of the agreement. Frameworks are established for bodies to buy goods or services via a pre-approved list of suppliers.

5.2 If a supplier is not on the framework can they still take part?

No. The framework has been awarded via an OJEU process. Suppliers at the time of advert had the opportunity to register their interest in being awarded a position on the framework. The tender process for the framework has now closed and all lots awarded.

5.3 Do I need to invite all suppliers to a mini competition?

You will need to invite all suppliers for the lot under which you are undertaking your mini competition unless there are specific reasons why you believe a supplier cannot deliver the services you require. Where this is the case you should check with the supplier first to ensure that you are not challenged later in the process.

5.4 How long does a mini competition need to run for?

This will depend on the complexity of the service. Contracting authorities should take into account the size of the contract, the number of services included, requirements for supplier site visits and TUPE. On average LPP would suggest suppliers are given four weeks to respond to the mini competition. For specific advice please contact the category manager.

5.5 Do I have to apply a stand still period to a mini competition?

LPP encourages the application of standstill periods for all mini competitions under the framework, especially where the value of the contract exceeds the OJEU thresholds. This ensures transparency to all suppliers involved in the process and minimises the risk of challenge once a contract is awarded.

6. Appendices

A – Supplier List by Lot

Analysis and Reconciliation Framework OJEU ref: 2015/S 227-413650

Supplier	Telecoms	Energy	Water	VAT	Estates	Accounts Payable	Temporary Staffing
ADSM (Advanced Demand Side Management Ltd)		Yes	Yes				
AXIOM Utilities Ltd		Yes					
BDO LLP				Yes			
Berthold Bauer Consultants Ltd	Yes			Yes			
CRS Vat Consulting Ltd				Yes			
Ernst & Young LLP				Yes			
GVA Grimley t/a Bilfinger GVA					Yes		
Liaison Financial Services Ltd				Yes		Yes	
M & C Energy Group Ltd (A subsidiary of Schneider Electric)		Yes	Yes				
Meridian Cost Benefit Ltd	Yes					Yes	Yes
PCMG (Professional Cost Management Group Ltd)	Yes	Yes	Yes			Yes	
RSM Uk Tax & Accounting Ltd				Yes			
The Utilities Exchange Ltd		Yes					
Utelecom Uk Ltd	Yes						

6.1 Appendix B – Supplier Contacts by Lot

Lot 1 Telecommunications

Supplier	Email Address
Berthold Bauer Consultants Ltd	Mark Sparrow 01732868266 07710907744 Mark.sparrow@bbvat.co.uk
PCMG (Professional Cost Management Group Ltd)	Rebecca Seabury 01253361605 07884112772 rseabury@pcmg.co.uk
Meridian Cost Benefit Ltd	Peter Welch 01727829640 07798765999 Peter.welch@recoveryaudit.com
Utelecom Uk Ltd	Lorent Reid 0845 2581100 07801 669769 Lorent@utelcom.co.uk

Lot 2 Energy

Supplier	Email Address
ADSM (Advanced Demand Side Management Ltd)	Patrick McCart 01753 833880 07970094743 pmccart@adsm.com
AXIOM Utilities Ltd	Ben Coburn 07754376463 ben@axiomutilities.com
M & C Energy Group Ltd (A subsidiary of Schneider Electric)	David Hunter 01383 745125 07805 140616 david.hunter@ems.schneider-electric.com
PCMG (Professional Cost Management Group Ltd)	Rebecca Seabury 01253361605 07884112772 rseabury@pcmg.co.uk

The Utilities Exchange Ltd	Nick Barrance 01473 599196 07917 582642 nick.barrance@uxenergyservices.com
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Lot 3 Water

Supplier	Email Address
ADSM (Advanced Demand Side Management Ltd)	Patrick McCart 01753 833880 07970094743 pmccart@adsm.com
M & C Energy	David Hunter 01383 745125 07805 140616 david.hunter@ems.schneider-electric.com
PCMG (Professional Cost Management Group) Ltd	Rebecca Seabury 01253361605 07884112772 rseabury@pcmg.co.uk

Lot 4 VAT

Supplier	Email Address
BDO LPP	Chris Morgan 0113 204 1234 0781 274 5575 chris.morgan@bdo.co.uk
Berthold Bauer Consultants Ltd	Mark Sparrow 01732868266 07710907744 Mark.sparrow@bbvat.co.uk
CRS Vat Consulting Ltd	Chris Silk 0845 686 0400 07734 053810 chris.silk@crsvat.com
Ernst & Young LLP	Audrey Fearing 0207 951 6531

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	07760 172768 afearing@uk.ey.com
Liason Financial Services Ltd	Philippa Debono 07551 154404 pdebono@liaisonfs.com
RSM UK Tax & Accounting Ltd	Scott Harwood 0203 2018465 078 5584 6419 bidteam@rsmuk.com

Lot 5 Estates

Supplier	Email Address
GVA Grimley t/a Bilfinger GVA	Julian Andrews 020 7911 2392 07961157576 julian.andrews@gva.co.uk

Lot 6 Accounts Payable

Supplier	Email Address
Meridian Cost Benefit Ltd	Peter Welch 01727 829640 07798 765 999 peter.welch@recoveryaudit.com
PCMG (Professional Cost Management Group Ltd)	Rebecca Seabury 01253 361605 07884112772 rseabury@pcmg.co.uk
Liason Financial Services Ltd	Philippa Debono 07551 154404 pdebono@liaisonfs.com

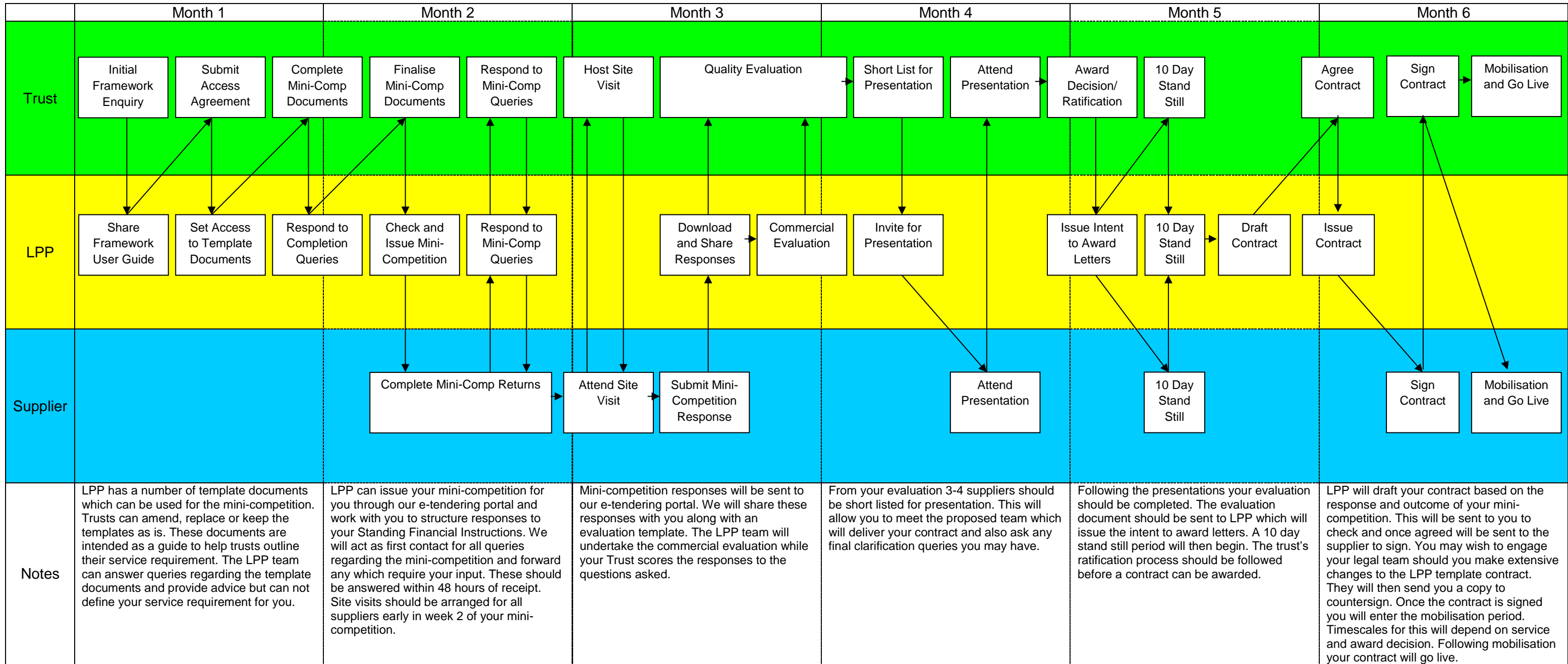
Lot 7 Temporary Labour

Supplier	Email Address
Meridian Cost Benefit Ltd	Peter Welch 01727 829640 07798 765 999 peter.welch@recoveryaudit.com

NHS London Procurement Partnership

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6.2 Appendix C – Responsibilities Matrix



6.3 Appendix D – Customer Access Agreement (CAA)

Customer Access Agreement is provided on the next page.



East of England NHS Collaborative Procurement Hub

CUSTOMER ACCESS AGREEMENT

for use by THE NHS LONDON PROCUREMENT PARTNERSHIP (LPP)

THE EAST OF ENGLAND NHS COLLABORATIVE PROCUREMENT HUB (EOECPH) FRAMEWORK AGREEMENT FOR ANALYSIS AND RECONCILIATION SERVICES

Contract Reference Number: 2015002NC

Before conducting any activity under this framework agreement please complete and return this form to EOECPH via your local LPP representative.

This agreement provides approval by The East of England NHS Collaborative Procurement Hub (EOECPH) for the below named Organisation to access the above named Framework Agreement only, subject to the conditions set out below.

In exchange for EOECPH granting approval to access the Framework Agreement, the Organisation AGREES:

1. I/We accept all responsibility for both accessing and using the Framework Agreement in accordance with its associated terms and conditions of contract;
2. I/We agree that EOECPH and LPP have no responsibility, or liability, on behalf of our Organisation relating to our use of this Framework Agreement;
3. I/We hereby certify that all information provided by EOECPH and LPP in relation to the Framework Agreement, in any form, will be kept strictly confidential and not be made available to any external entity other than our own, without prior permission of EOECPH. (Please note, this obligation shall not apply to the provision of information by public sector organisations in order to comply with government guidelines and/or legislation regarding transparency and expenditure of public money);
4. I/We authorise EOECPH to receive management information from contracted suppliers, regarding the usage of this Framework Agreement by the Organisation. Such information will be used by EOECPH for contract management/administration purposes, and will be shared with LPP.

AGREEMENT: I/We confirm that the organisation detailed below intends to participate in the above mentioned EOECPH framework agreement, and that in doing so will act in accordance with the guidance and instructions set out in the relevant EOECPH and/or LPP Contract Briefing Document, associated terms and conditions of contract, and in accordance with the Public Contracts Regulations (PCR) 2006 (as amended) or PCR 2015.

NHS London Procurement Partnership

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Customer Signature:	
Date:	
Name:	
Position:	
Name of Authority:	
Address:	
Telephone:	
E-mail	

Access facilitated by THE NHS LONDON PROCUREMENT PARTNERSHIP (LPP) - To be completed by LPP

Name:		Signature:	
Position:		Date:	

THE EAST OF ENGLAND NHS COLLABORATIVE PROCUREMENT HUB APPROVAL (To be completed by EOCPH)

Name:		Signature:	
Position:		Date:	

6.4 Appendix F – Mini Competition Documentation

1. Mini Competition Instructions	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
2. Abstract of Particulars	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
3. ITT Questions	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
4. Specification	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
5. Pricing Schedule	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
6. Terms & Conditions of Contract	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
7. Signed Document Set	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
8. Additional Information	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
9. Evaluation Template	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
10. Standstill Award Letters	Available following completion of the Customer Access Agreement (CAA) in Appendix D.

6.5 Appendix G – Call-Off Documentation

A&R template Call-Off letter	Available following completion of the Customer Access Agreement (CAA) in Appendix D.
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