

Better value, delivered.



User Guide | Ref No: 001095

# Software Application Solutions

Framework Agreement



# About YPO

**YPO provides procurement solutions for public sector organisations to set up or renew contracts for a wide range of services. Established in 1974 by a group of 13 local authorities, we're one of the largest public sector buying organisations in the UK and we're still 100% publicly-owned today.**

We work closely with our suppliers and collaborate with other public sector buying organisations to achieve efficiencies and value for money, returning all our profits back into the heart of the public sector. Our team of qualified procurement professionals can offer advice, guidance and expertise on procurement, as well as regular engagement and communication to make sure your objectives are achieved.



### **This is an interactive PDF**

You can click on the items listed above, and they will take you to the relevant page. You can also click on **Contents** in the top right of every page and it will bring you back to this contents page.

# Overview

## **Start date**

---

21 February 2023

## **Expiry date**

---

20 February 2025

## **Extension(s) (if applicable)**

---

1 x 24 month extension available after initial 2 years (20 February 2027)

## **Contracting authority (CA) call-off period**

---

CA's can specify a contract period, based on the term that will best suit their requirements

## **Contract notice reference number**

---

2022/S 0000--027908

## **Potential maximum value**

---

£20,000,000 - £150,000,000

## **Rebate**

---

0.75% on spend, payable by supplier/provider. Free to access and utilise by all public sector customers

## **Geographical location(s)**

---

National

# Overview

**This framework is for the provision of the Software Application Solutions, inclusive of products and services which will enhance/supplement/support the delivery and/or functionality of the solution.**

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation. Solutions may be cloud hosted, on premise, or via hybrid and are to incorporate technologies that are currently available and those which evolve through the lifetime of the Framework.

The Framework is designed to meet the needs of all public sector organisations which includes YPO's and NEPO's internal requirements, by establishing an agreement where the end customer will place orders directly with the Provider on a 'contract' basis and the Provider will deliver direct to the end customer on an agreed basis.

Direct award and further competition options provide you with a choice of compliant routes to market, whilst unlimited call-off contract lengths provide flexibility for your call-off requirements. CAs can carry out multi-lot call-offs under this framework, which involve combining two or more of the above lots, allowing you to obtain all your Software Application Solutions requirements in one single procurement.

Only the Providers who are awarded to all Lots, for which the Further competition is being carried out, will be invited to compete. There are 16 suppliers/providers awarded, 50% of which are SME's, all who can provide a high quality of services to the whole of the public sector.

**This framework is divided into the following lots:**

Lot	Description	No of suppliers/providers per lot	Method of call-off contracts
1	Business Application Systems	2	Direct Award
2	HR, Payroll and Workforce Management	4	Direct Award and Further-Competition
3	Financial and Accounting Management	4	Direct Award and Further-Competition
4	Environmental, Street and Waste Management	4	Direct Award and Further-Competition
5	Election Management and Citizen Services	1	Direct Award
7	Library Management	3	Direct Award and Further-Competition
8	Procurement and Contract Management	1	Direct Award
9	Land, Housing and Property Management	3	Direct Award and Further-Competition
10	Booking Systems and Management	3	Direct Award and Further-Competition
11	Education Management and Learning Systems	4	Direct Award and Further-Competition
12	Health and Social Care Systems	2	Direct Award and Further-Competition

## Lot structure

**The service solutions detailed within the lot descriptions are not representative of all services available under the framework but provide an example of what may be procured.**

**Suppliers/providers can offer a wide scope of products, works and services which meet the criteria of the individual lots and will make this readily available to CAs upon request.**

# Lot 1 – Business Application Systems

**This Lot is for the provision of business application software which can be used by organisations to perform various business functions, manage flow of information, and automate tasks, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to the full deployment of a software solution. This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply the solution detailed within the minimum criteria, which delivers all of the functionalities listed. Customer Call-offs may include the entire suite or may be individual applications to add to their existing technology environment.

Where individual business function specific software is required (such as HR and Payroll) and the functionality is covered in a separate Lot, it is envisaged that customers and Suppliers utilise the most suitable Lot to meet the customers business requirements for the Call-off.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the following solution;

1. **Enterprise Resource Planning (ERP) system** for the management of core business processes across an integrated platform, with functionalities including but not limited to;
  - Customer relationship management (CRM) – case management
  - Financial and income management – accounts, cash management, budgeting, forecasting
  - Human capital management – human resource, payroll, training, and recruitment
  - Planning and project management – planning, scheduling, and resource management
  - Production management – manufacturing, quality assurance and distribution
  - Supply chain management – purchasing, sourcing, procurement, inventory, warehouse management and logistics

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Asset management systems
- Business intelligence and data analysis systems
- Case management systems
- Content management systems
- Core back-office systems
- Database management systems
- Data back-up and recovery
- Desktop publishing software
- Desktop virtualisation
- Electronic document management
- Inventory management systems

- Operating systems
- Product information management systems
- Productivity applications (office, creative, graphics, database, presentation etc.)
- Warehouse management systems
- Workflow management systems

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers can write their own specification to suit their exact needs and requirements.

# Lot 2 – HR, Payroll and Workforce Management

**This Lot is for the provision of HR, payroll and workforce software to support the processing and management of people at all stages of the employment lifecycle, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to the full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

If customers are looking to procure a full ERP solution, inclusive of HR, payroll, and workforce modules, they should utilise Lot 1 – Business Application Systems, alternatively, multi-Lot Call-offs are permitted.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver at least two of the following three solutions:

1. **HR people management software** for the management of multiple employees throughout the employment lifecycle, including but not limited to;
  - Capture employee data such as personal details and history, and associated documents accessible via users and individuals
  - Case management
  - Recruitment and onboarding process

- Contractual agreements
- Absence management to request and authorise employee leave, with automatic recalculation of entitlement and adjustments for payroll
- Expenses claim management including data capture and storage of documents, for approval or rejection by permissible users
- Performance management to identify employee training and development opportunities, compliance, qualifications, and skills
- Functionality to process new starters/leavers
- Annual leave entitlement/calculations

2. **Payroll Software** to support the processing of expenses and payroll requirements within set parameters, including but not limited to;

- Attendance processing to record employee working hours and automate payroll
- Absence processing of multiple leave schemes
- Deductions processing
- Allowances processing
- Performs all statutory calculations in accordance with current legislation and interfaces with HMRC for Full Payment Submissions (FPS), Employer Payment Summary (EPS) returns, tax codes and student loan updates
- Functionality to hold multiple grades and date effective pay scales. Automated back pay processing will be required in respect of retrospective pay changes, part period calculations for mid period changes, starters, and leavers
- Functionality to process multiple benefits and pension schemes to assess and auto enrol, perform



## Lot 2 – HR, Payroll and Workforce Management continued

differing calculations at scheme level and provide contributions and employees details extracts to pensions providers

- Scheduling functionality to allow tasks (e.g., All employee payroll calculations) to be scheduled and run in the background, or out of hours
- Full web/online functionality – employee and manager self-service, starter, changes, absence, leavers and timesheet input processing, mobile technology, and access to on-line payslips, P60s, P45s and P11s
- Functionality to interface with external systems such as configure and upload ad-hoc and recurring data imports, able to generate extracts to third parties, HR, financial systems, and pensions providers (for example but not limited to MyCSP)

**3. Workforce Management Software** to plan and manage workforce demands, including but not limited to:-

- Track employee time and attendance
- Rota and timesheet management
- Scheduling and rostering functionality to align resource and demand
- Absence management
- People management
- Workflow and workforce planning

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Background checks
- Human capital management
- Workforce census
- Clock-In/Clock-Out solution

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.



# Lot 3 – Financial and Accounting Management

**This Lot is for the provision of financial and accounting management software to automate and support the financial and accounting processes, covering the entire report-to-record cycle within an organisation, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment or upgrade of an existing solution, from a single boxed order through to full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

If customers are looking to procure a full ERP solution, inclusive of financial and accounting modules, they should utilise Lot 1 – Business Application Systems, alternatively, multi-Lot Call-offs are permitted.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver one or more finance functionalities of the following solution:

- 1. Financial and Accounting Management software** to enable automated processes which support finance workflows and activities, including but not limited to;
  - Functionality and accessibility of ledgers including general, sales and purchase
  - Payment processing to track, manage and facilitate

electronic purchase-to-pay processes via a variety of payment methods including but not limited to; multi-channel payment processing (including but not limited to) online, face-to-face, telephone.

- Automated bank payments including direct debits and banks transfers for reoccurring payments
- Receipting
- Bank reconciliation
- Income and fund management
- Expense management
- Cash management
- Debt management
- Procurement management – including but not limited to order management, spend management, procure-to-pay processes, supplier management
- Asset management and inventory control
- Tax management in line with HMRC processes
- Budgeting, forecasting and financial planning of income and expenditure
- Policy management including legislation, accreditation, and licensing

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Revenues and Benefits software to support digital citizen services and access including council tax management, business rates, housing benefit and local welfare management including calculating, processing, billing, collection, recovery, administration, and associated management
- Grant funding and management software

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 4 – Environment, Street and Waste Management

**This Lot is for the provision of environment, street and waste management software and systems, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to the full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment:

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the following solutions listed below.

**1. Asset management software** suitable for use and support of various asset types within environmental, highways, infrastructure, street, and waste facilities to assist with the organisation and co-ordination of activities and data management and maintenance of assets.

- Asset management (core functions) including but not limited to; create, track, record and manage inventory of data records
- Activity and task management
- Communication and engagement tools
- Document workflows, management and sharing
- Invoicing and payment functionality
- Legislation conformity and governance
- Planning tools
- Referrals management
- Resource and works management
- Scheduling and booking
- Visual data including mapping and geographical viewing
- Workflow automation

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Cleaning management
- Drainage management
- Environmental Health and regulatory systems
- Financial management (specific to environment, street and/or waste)
- Flood management
- Geospatial/GIS mapping and data
- Green spaces management (grounds, parks, play areas)
- Health and safety system
- Highways asset management
- Inventory management (specific to environment, street and/or waste)

- Pollution Control System
- Risk management (specific to environment, street and/or waste)
- Street works
- Traffic management
- Tree management
- Waste and recycling management
- Workforce and contractor management (specific to environment, street and/or waste)

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/ or products which enhance/supplement/support the delivery and/ or functionality of the primary service and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 5 – Election Management and Citizen Services

**This Lot is for the provision of Election Management and Citizen Services software systems, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to the full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment:

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the following solutions listed below.

- 1. Election/Electoral Management software** to support and manage all statutory aspects of electoral services, such as canvassing, elections and referendums, including but not limited to;
  - Ballot casting, vote management, validating, counting, results

- Centralised database to hold all related information and documentation, with data matching facility
- Communication and engagement tools
- Election configuration, administration and management
- Mobile canvassing
- Polling station management
- End user (voter) registration, identification, verification, authorisation etc.
- Workflow automation
- Elected officials & workforce/staff management

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Burial, cemetery, and crematoria management
- Census data management
- Citizen self-service/access software
- Citizen experience and engagement software including chatbots
- Committee management software to coordinate paperless meetings, compile documents, track decisions/actions
- Coroners' software
- Democratic content management software
- Democratic management information systems
- Demographics data solutions
- Digital communications and e-forms
- Leisure management software
- Licensing, registering and permit software

- Media management tools
- Online voting solutions
- Registrar booking and ceremony management software
- Trading standards software

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the primary service and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 7 – Library Management

**This Lot is for the provision of software and systems to manage and automate a library environment of any size, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment or upgrade of an existing solution, from a single boxed order through to full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the following solutions:

1. **Library management software** for the digital management and recording of all assets and activity within a library environment of any size. All solutions must include modules with the functionality for;
  - Acquisitions/finance to manage spending and transactions such as orders, receipting and invoices
  - Cataloguing with Z39.50 connectivity, including

standard fields and ability to add additional custom fields

- Indexing and search functionality by various fields such as title, author, ISBN, subject and more
- Circulation recording to manage check ins/outs, holds etc. for flexible member borrowing
- Loans and fine generation
- Inventory management and booking facility of multiple digital and paper resources such as books, magazines, equipment, rooms, multimedia, archives, etc.
- Membership management including personal data capture, registration, fees and payments, fines etc.
- Self-service user processes for issues, renewals, and returns
- Barcoding and RFID capability
- Compliant to MARC21 standards
- Compatible with OPAC (Online Public Access Catalogue) to share your catalogue with your library users

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Archive management
- Booking facilities for community benefit
- Connection with other libraries to share resources
- Data conversion services
- E-Library solutions
- Library accessibility solutions
- Library resource provisions

- Notifications and messaging facility
- Resource management (specific for a library environment)
- RFID technology solutions
- Self-serve technology and equipment (in addition to those listed above)

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 8 – Procurement and Contract Management

**This Lot is for the provision of procurement and contract management software, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment.

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to the full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

If customers are looking to procure a full ERP solution, inclusive of procurement modules, they should utilise Lot 1 – Business Application Systems, alternatively, multi-Lot Call-offs are permitted.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the solution listed below.

**1. Procurement portal** providing a full electronic tendering system which manages the full procurement cycle and all parts of an online

procurement exercise from pre-tender engagement through to contract award and implementation and contract management in line with all relevant regulations, including but not limited to;

- Auditable process trail
- Centralised secure database to hold all tender related information and documentation
- Communication and engagement tools – public and private messaging, clarifications, notifications, alerts etc.
- Contract management of supplier contracts including performance management
- Document workflows, management and sharing
- E-catalogue facility
- E-procurement including e-auctions, e-Sourcing, e-Tendering
- Legislation conformity and governance
- Publish compliant contract notices and tender opportunities in line with regulations, including framework agreements, DPS, contracts, RFI/RFQ, mini/further competitions in line with current and future procurement regulations
- Purchase to pay to manage invoice payments
- Questionnaire templates available (standardised and customisable) with a variety of question formats (Yes/No, text field, upload documents etc.)
- Supplier management
- Workflow automation and parameter setting
- User functionality across varying levels, dependant on user profiles

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Contract management system
- Marketplace
- Procurement portals and platforms

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 9 – Land, Housing and Property Management

**This Lot is for the provision of land, housing, and property software, digitising all aspects of management and procurement, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to the full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver at least one of the two following solutions listed below.

**1. Housing Management System** featuring all customer and property information on a single database to centralise data and manage all elements of housing and/or property estates, including but not limited to;

- Allocations
- Case Management
- Customer and property database; create, track, record, manage inventory
- Communication and engagement tools
- Customer relationship management
- Document workflows, management and sharing
- Estate management

- Financial and payment management – rents, arrears, service charges, income
- Leaseholder management
- Legislation conformity and governance
- Lettings management
- Property management
- Repair and maintenance activity management
- Resource management
- Tenancy/resident management
- Workflow automation processes
- Workforce management and works planning
- Void management

**2. Property Asset Management** solution to assist organisations with the efficient and compliant management of their property assets, with functionality including, but not limited to:

- Asset management (core functions) including but not limited to; create, track, record, manage inventory of relevant assets and liability register



## Lot 9 – Land, Housing and Property Management continued

- Budget forecasting and scenario modelling
- Contractor and works management and planning
- Energy data management, modelling and energy performance certificates production
- Mobile surveying, data and information
- Property servicing and inspections (including but not limited to: gas, fire risk, asbestos)
- Repair and maintenance activity management
- Risk and compliance management and assessments
- Stock management, condition and option appraisals
- Survey reporting
- Workflow automation processes
- Document management with facility to upload and store documents and images contributed to an individual property/end user such as plans/photos/drawings

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

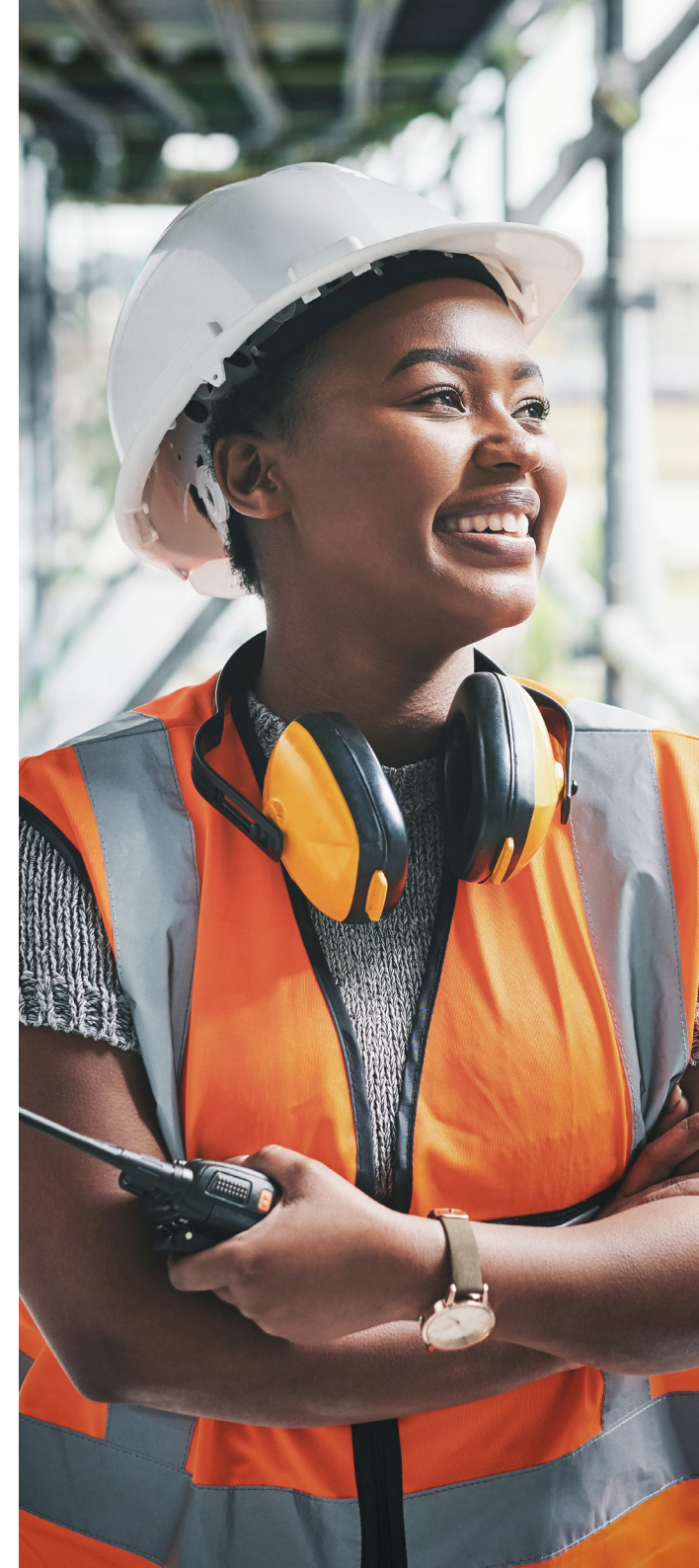
- Allotment management software
- Building control software
- Conveyancing software
- Decarbonisation solutions
- Estate and repairs management
- Facilities management (relevant to land, housing and/or property)
- Financial management (relevant to land, housing and/or property)
- Geographic Information System (GIS) mapping and data
- Homelessness advice, prevention and case management
- Housing management and repairs
- Housing register

- Land charges, development, and management
- Mobile workforce solutions
- Planning software
- Property planning and development
- Property purchase processes
- Regulated services (relevant to land, housing and/or property)
- Risk management software (relevant to land, housing and/or property)
- Workforce management (relevant to land, housing and/or property)

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.



# Lot 10 – Booking Systems and Management

**This Lot is for the provision of booking platform software to support workplace management, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the following solution:

**1. Booking Software** which allows end users to book and manage a range of events, meetings, functions, facilities, rooms, desks and other equipment online, through the management of resources, capacity and availability, including but not limited to;

- Calendar view, sync and scheduling
- Create bookings, edit, check in and cancellation
- Interactive floor plan/layout views for easy booking management
- Manage individual and multi person bookings (book on behalf of others, and attendees)
- Manage room resources and services
- Automated reminders and notifications of bookings
- Payment capability
- Recurring booking function

**Example solutions, products, and services** which Suppliers within this Lot may be required to provide include but are not limited to;

- Appointment management
- Asset management of booking resources
- Building capacity management
- Corporate and public bookings
- Digital displays and kiosks for viewing, booking, check in/out
- Event management
- Green space booking – parks, countryside, playgrounds etc.
- Leisure/sports management
- Meeting room management
- Resource booking – rooms, desks, spaces, car parking, transport, accommodation, equipment, events, classes, courses and more

- Sports and recreation booking
- Ticketing systems
- Venue management
- Visitor management
- Cross organisation sharing for joint office space

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 11 – Education Management and Learning Systems

**This Lot is for the provision of software to support the processing and management of student information and learning provisions, through all stages of the student lifecycle, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment or upgrade of an existing solution, from a single boxed order through to full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver at least one of the two following solutions:

**1. Student Management Information Systems** for use by all education establishments to process, manage and store the organisation, student, staff, and parent/guardian data throughout the complete student lifecycle from enquiry through to leaving, including but not limited to;

- Admissions and registrations
- Attendance and absence monitoring
- Behaviour monitoring
- Communication and engagement tools for staff, students, and parents/ guardians
- Document sharing
- Enrolment
- Exams and assessment management
- Individual learner records management
- Legislation conformity
- Registration
- Safeguarding and Special educational needs and disabilities (SEND) data tracking
- Scheduling
- Staff management
- Student management and monitoring
- Student support management and engagement
- Timetabling
- User functionality across varying levels, including but not limited to department, class, group, individual student etc.
- Facility to upload and store documents and images contributed to an individual via various user access (e.g. school, parent/guardian, provider)
- Application/portal accessible for students and parents/guardians to provide real-time data view of student performance and relevant communications
- Facility to integrate with other interfaces (such as finance software)

**2. Learning Management Systems (LMS) and/or Virtual Learning Environments (VLE)** to support

all processes and elements of learning and training management and delivery, including but not limited to; eLearning, a full or blended classroom experience, informal and social, online, and offline, with functionality including but not limited to:

- Create and manage bespoke and multiple learning content types and training courses based on roles and/or responsibilities, types of learning, delivery etc.
- Assessment setting and management including exam and test functionality
- Communication and engagement tools including notification and reminders
- Event booking and management
- Individual learner records management including personal development plans and learning pathways, programmes, certifications, compliance
- Legislation/compliance conformity
- Resource/lesson archive
- Talent management
- Timetable/calendar – track attendance, planning, calendar invites
- Facility to upload and store documents and images
- Facility for collaborative learning, across multiple sites
- Performance management and measurement of learners, including rewards and recognition,

## Lot 11 – Education Management and Learning Systems continued

appraisals, 360 feedback tools

- Supports e-learning standards such as, but not limited to: SCORM (Sharable Content Object Reference Model), AICC (Aviation Industry Computer-based Training Committee) and/or xAPI where applicable
- Supports all image, audio and video formats and multimedia distribution
- Workflow management
- User functionality across varying levels, including but not limited to administrators and end users
- Facility to integrate with other interfaces (such as Student management information systems)

**Example solutions, products, and services** which Suppliers within this Lot may be required to provide include but are not limited to;

- Alumni management software
- Apprenticeship management software
- Assessment software
- Case management systems (relevant to education and/or learning)
- Classroom management software
- Communication and engagement tools (relevant to education and/or learning)
- CPD Systems
- Customer relationship management systems

(relevant to education and/or learning)

- Curriculum software
- Data management services (relevant to education and/or learning)
- Digital/eLearning and remote teaching solutions
- Early Years education software
- Event, booking and appointment management software (relevant to education and/or learning)
- Exam management software
- Funding management (relevant to education and/or learning)
- Inspection and improvement solutions
- Learning content design and development
- Learning portals
- Learning process management
- Miscellaneous education and extra curricula activity software
- Nursery management software
- Regulatory and statutory services
- Transport and route planning (relevant to education and/or learning)
- Safeguarding software
- School governor software
- School management and performance software
- School reporting assistance
- Student recruitment

- Student wellbeing

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery, design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.

# Lot 12 – Health and Social Care Systems

**This Lot is for the provision of health and social care software to support and deliver joined-up care of individuals across health and social care settings, as well as other functions of social care organisation, using technologies that are currently available and those which will evolve through the lifetime of the Framework.**

This may be for a new solution, amendment, or upgrade of an existing solution, from a single boxed order through to full deployment of a software solution.

This may include commercial off the shelf software (COTS), open-source software, software licenses or niche and bespoke software specific to the organisation.

Suppliers must be able to supply a solution which delivers all the functionalities listed within each criterion. Customer Call-offs may include the entire suite or individual applications to add to their existing technology environment.

**Minimum Criteria – Suppliers within this Lot must be able to provide as a minimum;**

Products and services, including any hardware or peripherals to deliver the following solutions:

**1. Case Management System** for use within an adult's/children's/youth, health, and/or social care environment, to process, manage and store the organisation, individual service user, staff, and associated data, to manage multiple case types through to resolution, including but not limited to;

- Activity and task management
- Appointment and diary scheduling/management
- Budget management
- Care management and monitoring (service users, incidents etc.)
- Communication and engagement tools
- Document workflows, management and sharing
- Individual digital care records – create, tracking and management
- Invoicing and payment functionality
- Legislation conformity and governance
- Planning
- Referrals management
- Resource management
- Scheduling
- Workforce management
- Compliance with regulations specific to each UK nation
- Support varying case types (referrals, complaints etc.) through to closure/outcome
- Facility to upload and store documents and images contributed to an individual via various user access (e.g., service user, provider)
- Application/portal accessible by service user and social care provider to provide real-time data view of key insights relevant communications
- Provider management

**Example solutions, products and services** which Suppliers within this Lot may be required to provide, include but are not limited to;

- Brokerage
- Care planning software (home, residential, workforce, community and other centres and care services)
- Children and youth services including children/youth centres, nursery and childcare management
- Community health solutions and referrals
- Compliance and auditing software to ensure regulatory compliance
- Document management
- Domiciliary care
- Domestic abuse case management
- Drugs and alcohol case management
- Electronic patient management
- Engagement tools (relevant to health and social care)
- ERP (Enterprise resource planning) and solutions to integrate all HR, payroll, and workforce requirements – (relevant to health and social care)
- Financial management (relevant to health and social care)
- GP practice software
- Health care software including but not limited to electronic patient records, bed management, patient administration, prescriptions etc.
- Learning systems specific to health and social care sector

## Lot 12 – Health and Social Care Systems continued

- Medication management software
- Residential care software including but not limited to patient records, room/bed management, patient administration, prescriptions etc.
- Safeguarding software
- Social Care case management software to support care delivery, management, and monitoring of individual care, residential and home care
- Transport solutions
- Urgent care solutions
- Workforce management software (relevant to health and social care)
- Youth Services including youth offending and youth justice systems

**Additional Services** which may be provided as optional extras to the main requirement, which fit within the scope of the Lot description, including but not limited to;

- Any additional Supplier services and/or products which enhance/supplement/support the delivery and/or functionality of the solution and are not required as an enabler to make the solution work
- Other related professional services associated with the provision and performance of the services
- Support and delivery of a full end-to-end digital solution (in addition to the mandatory requirements) including but not limited to: audit and discovery,

design and development, deployment, migration, and transitioning, maintenance, monitoring, and management. (These services should be tailored to individual customer requirements and may be provided in elements, or as a fully managed service by the Supplier.)

This list is indicative but not exhaustive. Customers will write their own specification at Further-competition stage to suit their exact needs and requirements.



# How to use the framework agreement

To access the framework agreement and accompanying documents, customers should complete and return the Customer Access Agreement found in the 'Documents' tab of the framework website page. Upon the signed access agreement YPO can provide CAs with the tender documentation and requirements to help assist with their further competition process.

## Award criteria

Suppliers/providers were assessed on the following award criteria, which has been used to establish the agreement;

Award criteria – all lots assessment criteria	Percentage weightings
Cost	30%
Non-Cost (Quality)	60%
Social Value and Sustainability	10%

Direct award may be evaluated on price only (100%) or price and quality.

At further competition stage the full weightings may be re-opened to compete at the CAs discretion, to suit their specific requirements, but must add up to 100%. CA's can also set any appropriate KPI's and/or service levels within the quality award criteria.

YPO envisages that the 'quality' award criteria may be made up of (but not limited to) the questions under the areas listed below:

- Implementation and migration
- Quality of Service
- Supplier Standards and Certification
- Customer Service and Account Management
- Delivery
- Lead Times
- Corporate Social Responsibility
- Innovation and Added Value

## How to call-off the framework

YPO have completed a full OJEU compliant process to allow our customers easy call-offs via direct award or further competition, through any of the awarded suppliers/providers.

A direct award is where a CA carries out an assessment on the criteria set in the YPO framework documentation, to determine which supplier/provider they will call-off to, this can be based on price and quality.

A further competition gives CAs the ability to evaluate supplier/provider capabilities on both quality and price, using criteria and specifications relevant to their own organisation's individual requirements.

As soon as you make the decision to utilise the framework, please contact YPO to receive a unique reference code for the opportunity, which should be referenced on all documentation and any supplier/provider engagement.

## Direct award

Direct award allows you to call-off directly to a chosen supplier/provider without conducting a full competitive process. Direct award can be made to any awarded supplier/provider.

CA can demonstrate the selected supplier/provider offers them the most economically advantageous solution. CAs will be responsible for their assessment of providers to determine a direct award, which can be based on quality and price. To assess the suitability of the supplier/provider, CAs will be able to view the following documentation:

- The results of the tender evaluation including supplier/provider responses and scores
- Supplier/provider pricing submitted as part of the tender process
- Supplier/provider price list showcasing the scope of products, work, and services they can provide under each lot

If you are unable to find a match to your requirements, you can raise a Request for Information (RFI) to the suppliers/providers on your relevant lot. You will need to provide a statement of your requirements, so they can direct you to an existing submitted offer or add this solution to their price list.

At direct award stage you need to provide the supplier/provider with the relevant information to deliver the service you require. The following needs to be completed for a direct award:

# How to use the framework agreement continued

- Advise the supplier/provider of the direct award
- Complete the call-off contract that is provided on the YPO website
- Complete the order form that is provided on the YPO website
- Complete the direct award confirmation template to advise YPO of the award

## Best Practice Tip

**Direct award is best suited to situations such as (but not limited to); low value/low complexity requirements, goods or services which are exclusive to one supplier/provider, continuity or additions to existing goods or services, urgent/one-off requirements. Ensure to follow any internal processes and procedures to assess supplier/provider capability and determine if this route offers best value for your procurement.**

For further guidance on the direct award process, please refer to the 'Direct Award Guidance' found in the 'Documents' tab of the framework website page

CAs should ensure to follow any internal processes and procedures to assess supplier capability and determine if this route offers best value for your procurement.

## Further competition

On creation of any framework, YPO aims to evaluate suppliers/providers based on criteria relevant to any organisations that may decide to utilise the agreement. A further competition gives CAs the ability to evaluate suppliers'/providers' capabilities on both quality and price, using criteria and specifications relevant to their own organisation's individual requirements.

Upon receiving the signed access agreement, YPO will be able to provide you with any tender documentation and requirements to assist you with your further competition process.

## Award criteria

Suppliers/providers were assessed on the following award criteria, which has been used to establish the framework agreement:

Award criteria – all lots assessment criteria	Percentage weightings
Cost	30%
Non-Cost (Quality)	60%
Social Value and Sustainability	10%

CAs may use the criteria and weightings published by YPO, or the full weightings may be re-opened to compete at the CAs discretion, to suit their specific requirements, but must add up to a total of 100%. CA's

can also set any appropriate KPI's and/or service levels within the quality award criteria.

There are no set questions that CAs must include in their further competition, we would suggest that these are related back to your specification and the outcome you are trying to achieve. YPO envisages that the award criteria may be made up of (but not limited to) the questions under the areas listed below:

Criterion	Example award criteria
<b>Cost</b>	<ul style="list-style-type: none"> <li>• Price</li> <li>• Lifecycle costs</li> <li>• Cost effectiveness</li> </ul>
<b>Non-Cost (Quality)</b>	<ul style="list-style-type: none"> <li>• Quality of service</li> <li>• Supplier standards and certification</li> <li>• Customer service and account management</li> <li>• Delivery and logistics</li> <li>• Lead times</li> <li>• Innovation and added value</li> <li>• Pre/post service support</li> </ul>
<b>Social Value and Sustainability</b>	<ul style="list-style-type: none"> <li>• Social value</li> <li>• Sustainability</li> <li>• CSR</li> <li>• Environment</li> </ul>

YPO can assist CAs to produce specifications, qualitative questions, pricing schedules and evaluation criteria to undertake a further competition, FOC.

# Further competition process

**For complex requirements, or those which exceed the threshold value of the current Public Contract Regulations, CAs must run a further competition process either via their own internal processes or through YPO's procurement portal.**

YPO has standard further competition template documents that can be downloaded either via the YPO website or at request from the YPO team, please contact [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk). CAs may also use their own templates if they prefer.

Here's a quick overview of the further competition process;

## 1. Pre-engage to help define your requirements

Prior to publishing your further competition opportunity, you may find it useful to pre-engage with awarded suppliers/providers, especially for large complex requirements, to seek additional information, help refine your requirements and explore available solutions.

## 2. Define your requirements

Your specification should give suppliers/providers a clear understanding of the specific goods/services you require them to deliver. CAs must also supply suppliers/providers with the evaluation methodology, based on the cost and quality criteria set out above.

## 3. Create documentation

CAs need to complete the further competition

documents, either using the YPO templates or their own if preferred.

All documentation must reference the framework and lot number, and will need to include;

- Invitation to Tender (ITT) – including requirements specification, mandatory requirements, award criteria, timetable, evaluation methodology
- Any additional schedules

## 4. Issue the further competition

The opportunity must be published to all suppliers/providers awarded to the relevant lot/s, to invite them to bid against your requirement. If your requirement covers multiple lots, only suppliers/providers who are awarded to all lots that you are utilising, will be invited to compete.

There are no minimum or maximum timescales that a further competition should be published within, however YPO would suggest the timescales are relevant to the complexity of your requirements/documents.

### Best Practice Tip

**Allow sufficient time for suppliers/providers to respond to your further competition, taking into consideration any bank holidays and the complexity of your requirements. Best practice would advise that you allow a deadline of at least four weeks or more, depending on the complexity of your requirement, less than this may result in poor submissions or a lower amount of supplier/provider responses.**



## Further competition process continued

The further competition can be issued via your own portal, or via YPO's e-tendering portal, we can assist with managing the process or provide you access to the portal to manage internally. If the CA decides to undertake their own further competition YPO must be informed via e-mail and notified of the outcome, using the monitoring/award form found on the YPO website.

CAs will need to provide clarification responses, which will be shared publicly unless the information contained is commercially sensitive to either party.

Responses received must be kept secure and unopened until the designated closing date and time for final submissions has passed. Responses received after the specified date and time should be rejected.

### 5. Evaluation

CAs evaluate and identify their winning provider based on the most economically advantageous tender. The submitted response must be evaluated in accordance with the criteria stipulated in the original further competition document.

### 6. Award

On identifying the successful supplier/provider, YPO would suggest carrying out a standstill period of 10 calendar days, before contract award. This period is voluntary, but would be recommended especially for a long term, or high value call-off contract. The CA must ensure all suppliers/providers who tendered are advised of the outcome of the further competition in writing, including brief details on where scores were achieved and missed.

At the end of the standstill period, the CA will need to complete the following with the successful supplier/provider;

- Complete the order form provided on the YPO website
- Provide a PO where required
- CA and supplier/provider to inform YPO of the successful award and complete the 'Confirmation of award' template

A Contract Award Notice following any award via the framework agreement must be published within 30 days (YPO are able to do this on behalf of the CA if required).

For more guidance on the further competition process, please refer to the 'Further Competition Guidance' found in the 'Documents' tab of the framework website page.



# How YPO can assist you

If you are looking to run an opportunity through this framework, YPO can assist you with the following (all FOC);

Provide framework advice including suitable lots, call-off routes etc.

- Work with CAs to run engagement/meet the supplier/provider sessions
- Publish RFIs to the supply base and gather responses
- Assist with developing further competition documents
- Compliance check of documents
- Advertise on our e-tendering site – this can be managed by YPO, or the CA may have log in access
- Manage the clarifications
- Assist with evaluation of price and any other non-quality aspects
- Guidance and assistance throughout the entire process
- Provide evaluation templates
- Produce award and rejection letters
- Award on our e-tendering site
- Assist with debriefs

In essence we will assist you as much or as little as needed, the only things we cannot do are: write your specification or evaluate the quality of the product/service as this needs to be done in house. If you require any further guidance, or would like the YPO team to run your further competition please contact us:



# Benefits of using the framework agreement

**YPO's framework agreements are established to allow customers to purchase goods, works or services from suppliers/providers via direct award or further competition.**

- Available to use by all UK public sector bodies
- This framework is compliant with UK/EU procurement legislation – we've done the work, so there's no need for you to run a full EU procurement process, reducing risk and timescales
- Assured supplier/provider standards – suppliers/providers listed on the framework were assessed during the procurement process for their financial stability, compliance to legislation, experience, and technical and professional ability to give customers confidence of a quality service
- Supplier/provider choice – with 18 suppliers/providers available on the framework across offering excellent choice and industry expertise
- Pre-defined terms and conditions – terms and conditions of the contract have already been established and signed and accepted by the supplier/provider. On awarding contracts customers have the option to use YPO's standard framework agreement terms and conditions as established, or use their own if preferred
- No defined call off length – you can specify a contract period, based on the term that will best suit your requirements
- Aggregation of spend – customers will receive the benefits of the aggregated spend volume and increased leverage in the market
- Aggregated competitions – YPO can assist with developing and running aggregated competitions with other buyers with similar requirements
- Simplified lot structure – easy to understand lot requirements which allow purchase decisions based on solutions and outcomes
- Choice of call-off routes – direct award capability for a quick, easy and compliant call-off route or re-open award criteria weightings at further competition to suit your specific requirements
- One stop shop – multi-lot call-offs are permitted with this framework, allowing customers to procure all their software solutions in one single procurement and award to one supplier/provider for their full software requirements across multiple lots.
- Access to the latest technology – the framework allows for delivery of solutions using technologies that are currently available and those which evolve throughout the lifetime of the framework agreement, giving you access to the newest equipment and service offerings
- Easy to use – customers need only to identify their requirements, present these to the market and award a contract. This can be done either via YPO or directly with the awarded suppliers/providers
- Full support service – YPO can assist you with your procurement and managing the call off-process, from the building of documents, running the further competition, through to evaluation. YPO can conduct this on your behalf (at no cost to you) taking care of all key areas making the process totally hassle free and compliant with as little or much involvement as you require

To find out more about our suppliers/providers please visit the framework website page where you can read an overview about their organisation and view a range of resources showcasing what they can provide.

# Awarded suppliers/providers

<b>Lot 1 – Business Application Systems</b>		
Insight Direct (UK) Ltd		
<b>Lot 2 – HR, Payroll and Workforce Management</b>		
Civica UK Ltd		
Insight Direct (UK) Ltd		
Staff Absence Management Ltd		
<b>Lot 3 – Financial and Accounting Management</b>		
Chess ICT Limited		
Civica UK Ltd		
Insight Direct (UK) Ltd		
<b>Lot 4 – Environmental, Street and Waste Management</b>		
Causeway Technologies Ltd		
Civica UK Ltd		
Compass Informatics Limited		
Symology Ltd		
<b>Lot 5 – Election Management and Citizen Services</b>		
Civica UK Ltd		
<b>Lot 7 – Library Management</b>		
Bibliotheca LTD		
Civica UK Ltd		
Sirsi Ltd t/a SirsiDynix		
<b>Lot 8 – Procurement and Contract Management</b>		
Panacea Applications Limited		
<b>Lot 9 – Land, Housing and Property Management</b>		
Asprey Management Solutions		
Civica UK Ltd		
Compass Informatics Limited		
<b>Lot 10 – Booking Systems and Management</b>		
Insight Direct (UK) Ltd		
Matrix Booking Limited		
Ricoh UK LTD		
<b>Lot 11 – Education Management and Learning Systems</b>		
Access UK Limited		
Civica UK Ltd		
Liquidlogic Ltd		
Key Support/Arbor (Arbor Education Partners)		
<b>Lot 12 – Health and Social Care Systems</b>		
Access UK Limited		
Liquidlogic Ltd		

# Suppliers/providers contact information

**Prior to running your further competition, you may find it useful to pre-engage with awarded suppliers/providers on the contract, especially for large complex requirements, to seek additional information, refine your requirements and explore available solutions.**

You may pre-engage directly with the suppliers/providers using the contact details found below, or YPO can assist you with running a Request for Information exercise.

Please ensure that any pre-engagement references the framework number so suppliers/ providers can identify the opportunity when this becomes available.

Supplier/provider	Email address
Access UK Limited	<a href="mailto:enablement@theaccessgroup.com">enablement@theaccessgroup.com</a>
Asprey Management Solutions Ltd	<a href="mailto:rachel.ratty@aspreysolutions.co.uk">rachel.ratty@aspreysolutions.co.uk</a>
Bibliotheca LTD	<a href="mailto:sales-admin-uk@bibliotheca.com">sales-admin-uk@bibliotheca.com</a>
Causeway Technologies Limited	<a href="mailto:steve.white@causeway.com">steve.white@causeway.com</a>
Chess ICT Ltd	<a href="mailto:publicsectorsales@chessict.co.uk">publicsectorsales@chessict.co.uk</a>
Civica UK Ltd	<a href="mailto:bidsupport@civica.co.uk">bidsupport@civica.co.uk</a>
Compass Informatics Limited	<a href="mailto:pbaldacchinosteward@compass.ie">pbaldacchinosteward@compass.ie</a>
Insight Direct (UK) Ltd	<a href="mailto:richard.hodgkins2@insight.com">richard.hodgkins2@insight.com</a>
Liquidlogic Ltd	<a href="mailto:bidteam@liquidlogic.co.uk">bidteam@liquidlogic.co.uk</a>
Matrix Booking Limited	<a href="mailto:accountmanagement@matrixbooking.com">accountmanagement@matrixbooking.com</a>
Panacea Applications Limited	<a href="mailto:tenders@panacea-software.com">tenders@panacea-software.com</a>
Ricoh UK Ltd	<a href="mailto:jeremy.parish@ricoh.co.uk">jeremy.parish@ricoh.co.uk</a>
Sirsi Ltd T/A SirsiDynix	<a href="mailto:sales-uk@sirsidynix.com">sales-uk@sirsidynix.com</a>
Staff Absence Management Ltd	<a href="mailto:lucy.hutton@feps.co.uk">lucy.hutton@feps.co.uk</a>
Symology Limited	<a href="mailto:stuart.marshall@symology.co.uk">stuart.marshall@symology.co.uk</a>
The Key Support/Arbor (Arbor Education Partners)	<a href="mailto:bids@arbor-eduction.com">bids@arbor-eduction.com</a>

# Terms and conditions

Suppliers/providers awarded to the framework agreement have agreed to and signed YPO's standard Terms and Conditions. These can be amended by the CA and supplier/provider by mutual agreement to include additional terms to supplement the standard Terms and Conditions. A variation form is included in the standard Terms and Conditions document to allow customers and suppliers/providers to amend any terms if required.

## Contact information

For further information or to discuss individual requirements, please use the contact details below:

Name	Zoe Morgan-Kriek
Job title	Category Buyer
Category	ICT
Telephone	07580 698 044
Email	<a href="mailto:zoe.morgan-kriek@ypo.co.uk">zoe.morgan-kriek@ypo.co.uk</a> ,

Name	Dominic Crosse
Job title	Assistant Category Buyer
Category	ICT
Telephone	07540 670 275
Email	<a href="mailto:dominic.crosse@ypo.co.uk">dominic.crosse@ypo.co.uk</a>

Name	Maggie Liddan
Job title	Further Competition Coordinator
Category	ICT
Telephone	07833 860 409
Email	<a href="mailto:maggie.liddan@ypo.co.uk">maggie.liddan@ypo.co.uk</a>

[Email Maggie »](mailto:maggie.liddan@ypo.co.uk)



# Contracting Authority Access Agreement

## Goods and Services Framework Agreement for Software Application Solutions

YPO Contract Reference: 001095

Framework 21 February 2023 to 20 February 2027

### To be completed by the contracting authority

Prior to conducting any activity through this framework, please complete and return this form to YPO using the details given below.

### Access Agreement

I/we confirm that the organisation detailed below intends to participate in the above mentioned YPO arrangement, and that in doing so will act in accordance with the Public Contracts Regulations 2015. I/we confirm that any guidance and/or template documentation provided to me will only be used in relation to this YPO arrangement and will only be used for other purposes where prior consent from YPO has been granted. I/we also confirm that in consideration of YPO acting in this capacity I/we authorise YPO to make such arrangements with its' suppliers relating to rebates (and to make enquiries in relation thereto) as it considers necessary in order to recover its operating costs.

I/we acknowledge that suppliers' pricing, offering and other information under the Software Application Solutions Framework Agreement is at this point considered to be commercially sensitive and could well prejudice the commercial interests of the suppliers involved if the information were to be made publicly

available. I/we therefore hereby agree on behalf of the said organisation that we will keep strictly confidential the pricing information supplied to us and will not disclose the same or any part thereof to any other person, organisation or company and shall not make any use of such information or any part thereof for any purposes other than for accessing the framework.

I/We confirm that I/We will notify YPO of any awards (via further competition) made under this arrangement via e-mail to: [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk)

Signature

Date

Name of person signing this form

Position

Address

Telephone number

### How to complete this form

1. Please use Adobe Acrobat to complete this form.
2. Make a copy of this PDF and rename the copy so that it is easily recognisable.
3. With this copy only, delete all pages from the PDF except this form page.
4. Enter the required information into the boxes below.
5. Once all the boxes are complete, save the PDF.
6. Email the completed form to [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk)

Email

Product/service/lot(s) of interest

Estimated value

Please select one of the following:

Direct award

Further competition

Do you require any further information from YPO?

# Confirmation of Award

Contract: **Software Application Solutions**  
YPO Contract Reference: **1095**

YPO must be informed of any activity conducted under this framework which is run directly by the CA. Upon award of your call-off contract please complete this form and return to [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk).

Lead contact name

Call-of contract start date/date of purchase

Name and address of the organisation

Contract period

Email/telephone

Total value of the call-off contract

Lot number utilised

Savings achieved

Goods/services procured

Please provide feedback of your experience using the Framework agreement:

Awarded supplier

## How to complete this form

1. Please use Adobe Acrobat to complete this form.
2. Make a copy of this PDF and rename the copy so that it is easily recognisable.
3. With this copy only, delete all pages from the PDF except this form page.
4. Enter the required information into the boxes below.
5. Once all the boxes are complete, save the PDF.
6. Email the completed form to [itservices@ypo.co.uk](mailto:itservices@ypo.co.uk)

