

This **Multi-Lot, Multi-Provider Framework** is open to all LGPS Funds, Pools and other bodies for the procurement of Pension Administration Operational Support Services from a range of qualified Providers.

Using this Framework will **reduce the time and cost associated with procurement** by offering a facility that has already been competitively tendered.

## PROVIDERS

- Acuity Business Solutions Ltd (Lot 1)
- Aon Solutions UK Ltd (Lot 1 & 2)
- Barnett Waddingham LLP (Lots 1 & 2)
- Capita Pensions Solutions (Lots 1 & 2)
- Clay 10 Creative Ltd (Lot 2)
- EQ Paymaster (Lots 1 & 2)
- Heywood Pensions Technologies (Lot 1)
- Hymans Robertson LLP (Lot 1)
- Independent Transition Management Ltd (Lot 1)
- Intellica Ltd (Lot 1)
- Isio (Lot 1)
- Landscape (Lot 2)
- MakingGiants Limited (Lot 2)
- Mercer Limited (Lots 1 & 2)

## KEY DETAILS

*Dates of operation:*

**May 2022 - May 2026**

*Contract award length:*

**4 years - no contract will be permitted to extend beyond 30 April 2030**

*Structure: Multiple Lot - Multi-Provider*

*Procurement route:*

**Direct Award and Further Competition**

### LOT STRUCTURE:

**Lot 1 – Pension Administration Operational Services**

**Lot 2 – Specialist Pensions Communications and Engagement Services**

### WHO CAN USE THIS FRAMEWORK?

- Any LGPS Administering Authorities within England, Wales and Scotland including the Firefighters' and Police Pension Schemes
- NILGOSC in Northern Ireland
- The Board of the Pension Protection Fund
- Other Administering Authorities or scheme managers of a Public Sector pension scheme
- Other Public Sector bodies requiring pensions related services
- LGPS Funds, groups of Funds or bodies established by them with the purpose of operating on a collective basis

### FOUNDING AUTHORITIES:



Using National LGPS Frameworks can save you significant time and money whilst still delivering a service **specified to your requirements**, supporting local decision making and accountability.

## WHY SHOULD I USE THIS FRAMEWORK?

- **Easy access to pre-selected, specialist providers** - The National LGPS Frameworks provide an easy access route to pre-selected specialist Providers who are best placed to deliver Pension Administration Operational Support Services to the LGPS.
- **Efficiency and Flexibility**- The Framework removes the need for you to conduct full tender exercises or lengthy Provider evaluations, saving the time and costs associated with procurement exercises. In addition, this allows you to be more flexible with the planning and running of any tender process via Further Competition. There is also an option to **Direct Award** via both Lots.
- **Best practice procurement** - Each of the Providers on the National LGPS Frameworks have been subject to a rigorous procurement process, ensuring they offer the scope and quality services you require. The pre-agreed terms and conditions offer you contractual safeguards.
- **Agreed terms and conditions** - Terms and conditions are already established and agreed for you and Providers. This removes the need to re-draft and/or renegotiate terms for each procurement you undertake. You have the right to refine, but not fundamentally alter, the terms and conditions to take into account any special requirements. The terms and conditions also provide a 'no fault break clause' giving you the right to terminate the contract at any time by giving three months written notice to the contractor.
- **Comprehensive supporting documentation** - In addition to the Specification of Requirements and Call-Off Terms and Conditions, a comprehensive pack of supporting documents is provided to support your Further Competition. This includes Provider Catalogues, Guide to Further Competition, Example Invitation to Further Competition, Pricing Schedules and Award Letters.

### Full Tender Exercise

#### Tender

- Selection evaluation
- Financial evaluation
- Track record
- Capacity and expertise
- Knowledge and understanding
- Organisation and people

#### Select and award

- Evaluate and award

- Terms and Conditions
- Ceiling Prices

### Framework

#### Further Competition

- Refine requirement and evaluation criteria
- Further Competition
- Evaluate and Award

### Framework

#### Direct Award

- Identify most suitable Provider
- Invite to provide service

**All the stages in the grey circle have been undertaken by the National LGPS Framework Founding Authorities in setting up the Framework and is fully compliant with the Public Contracts Regulations 2015.**

6-9 months without Framework...

4-6 weeks or...

Same day with Framework



## HOW DO I JOIN?

We cannot share any of the commercially sensitive details of this Framework with you until you have completed and returned a signed **Confidentiality Statement and Option Form**. Returning this places you under no obligation to use the Framework but allows us to share the full set of Framework documents with you.

Once we have received your signed **Confidentiality Statement and Option Form** we will share the full set of documentation through our online Document Portal, including:

- **Guidance Notes**
- **Guide to Further Competition and Direct Award**
- **Example Invitation to Further Competition**
- **Example intention to Award and Contract Award Letters**
- **Order Form (A&B)**
- **Call-Off Terms and Conditions**
- **Rebate Structure and Examples**
- **Pricing Schedules**
- **Provider Catalogues**

Once you decide to use the National LGPS Framework we will send you two copies of your **Member Access Agreement**. This is a legal document between your Authority and Norfolk County Council (the Letting Authority for this Framework). The purpose of the document is to regulate any liabilities that may arise as a result of use of this Framework. **If your organisation already has a Member Access Agreement in place** from another Framework please let us know.

You will also receive an invoice for the **Joiner's Fee (see below)**. The National LGPS Frameworks are a not for profit programme established 'by the LGPS, for the LGPS' and the joiner's fee helps towards the ongoing support and administration of this Framework. You will then be able to carry out your **Direct Award or Further Competition**.

## JOINING FEES

Lot	Joining Fee
All Lots (maximum fee)	£1,500
Lot 1	£1,000
Lot 2	£1,000

### CONTACT US:

Email:  
[nationalLGPSframeworks@norfolk.gov.uk](mailto:nationalLGPSframeworks@norfolk.gov.uk)

Phone: 01603 306846

To view the other services available via National LGPS Frameworks, please visit  
[www.nationallgpsframeworks.org](http://www.nationallgpsframeworks.org)

## SPECIFICATION OF REQUIREMENTS

### Lot 1 - Pensions Administration Operational Services

Provision of operational administration services to LGPS Pensions Administrators across a range of Pension Administration work areas, including but not limited to:

- Data Interrogation and rectification, to include the following aspects:
  - Data exploration and analysis of member data sets, providing detailed outcome reports and identification of issues and gaps with required resolution activities
  - Undertake rectification and remedial data cleansing activities
  - Support Funds with data readiness for upcoming projects involving data cleansing activities e.g. McCloud, Pension Dashboards, GMP related projects (e.g. rectification and equalisation) etc.
- Pension Administration project delivery including those arising from legal judgements and legislative changes e.g. support with McCloud projects, employer transfers, Pensions, Administration System implementation support.
- Temporary/Ad-hoc general Pensions Administration support including but not limited to:
  - Pensioner payroll services
  - Benefit Calculations and Member Processing
  - Interim staffing support e.g. Pensions Manager
  - Employer led LGPS consolidation
  - member transfer exercises
  - production of member savings statements

### **Lot 2 - Provision of specialist pensions communications and engagement services**

Provide specialist support to design, develop and deliver effective LGPS multi-channel communications and engagement strategies, including but not limited to;

- Successful targeted member education and engagement programmes
- Brand development and advice
- Measuring the effectiveness and success of engagement, service delivery, user experience and outcomes
- Content and design advice and delivery including use of appropriate language (e.g. Plain English) and compliance with accessibility requirements and standards