

# National **LGPS Framework** for Member Data Services

## Introduction and joining instructions

### Member Data Services

**Collaboration**  
**Save time and money**  
**Quick and efficient access**  
**National LGPS Frameworks**  
**Common terms and conditions**  
**Procurement flexibility**  
**Better, faster, cheaper**  
**Local choice**



# Contents

Introduction .....	3
What is a framework agreement? .....	4
Why should I use this framework? .....	6
Framework route vs full procurement .....	8
Who can use the Framework? .....	9
What services are covered by this framework? .....	10
How much does it cost and what will I save? .....	14
How were the service providers chosen? .....	15
Joining the National LGPS Framework for Member Data Services .....	16
Anything else I need to know? .....	17
FAQs .....	18
Glossary .....	24
Contact us .....	26

## **Copyright © Founding Authorities of the National LGPS Framework 2018**

**Please note** these National LGPS Framework Guidance Notes do not purport to be comprehensive, have been prepared in good faith, and no representation or warranty, express or implied, is or will be made and no responsibility or liability is or will be accepted by any of the Framework's Founding Authorities, their officers, employees or agents in relation to their accuracy or completeness and to the maximum extent permitted by law any such liability is expressly disclaimed.

# Introduction

Since the enactment of the Public Services Pension Act in 2014 and the enhanced role of The Pensions Regulator in the governance of the LGPS, the issue of data quality has become an ever-increasing facet in the compliance framework of the administration of the Local Government Pension Scheme (LGPS), and with that the recognition of the reputational risks associated with non-compliance with the Regulators' Code of Practice in the area of member data management.

In the intervening years, the risks of poor data have been increasingly extended beyond the realm of the reputational and into the very real sphere of the financial risks that can arise from poor member data, be that through the impacts that poor data might have on scheme valuations, through to the significant financial sanctions that sit alongside breaches of the General Data Protection regulations (GDPR).

In order to address some of the issues that this increasingly challenging environment presents to the LGPS, the National LGPS Frameworks team, working with a range of LGPS funds, have established a Framework of specialist member tracing and mortality screening companies to assist LGPS administering authorities in the task of ensuring that their member data meets the high standards demanded by today's compliance regime.

Building on our successful approach to collaborative procurement, the multi-user, multi-provider Member Data Services Framework is open to all LGPS administering authorities, their pool partners and the wider public sector for the procurement of member tracing and mortality screening services from a wide range of qualified providers.

The National LGPS Frameworks are now a firmly established procurement vehicle in the LGPS. Using a framework can save you significant time and money, whilst still delivering a service specified to your requirements, and supporting local decision making and accountability. We hope that you will consider using this procurement route for your member tracing and mortality screening service requirements.

This framework has been established by Norfolk County Council (Norfolk Pension Fund), in collaboration with Bedford Borough Council (Bedfordshire Pension Fund), London Borough of Hackney, The City of Edinburgh Council (Lothian Pension Fund), Wirral Council (Merseyside Pension Fund), and City of Wolverhampton Council (West Midlands Pension Fund) (the "founding authorities").

# What is a framework agreement?

Frameworks are widely used across the public sector and are now firmly established in the LGPS. They are proven to be good for services that you can define and have demonstrated that considerable time and cost savings can be made.

A framework is an agreement put in place with a supplier or range of suppliers that enables purchasers to place orders with service providers without running a full tender exercise.

Frameworks are based on large volume purchasing. Aggregating different purchasers' potential needs means individual purchasers can buy goods and services at prices below those normally charged, or with special added benefits and/or more advantageous conditions.

Given the increasing focus on data LGPS funds will require fast and easy access to value for money data services such as Address Tracing and Mortality Screening.

Procurement can be costly and time-consuming with multiple selection exercises being undertaken across the LGPS. This may inhibit scheme administrators from accessing services they need when they need them.

The National LGPS Framework for Member Data Services reduces the time and cost associated with procurement by offering a facility that has already been competitively tendered providing an easy to use facility.

## Framework benefits:

- Easy access to pre-selected, specialist Member Data Services
- Collaboration and partnership
- Flexibility
- Best practice procurement
- Agreed terms and conditions
- Efficiency
- Value for money
- Quality of service provision
- Value added services
- No fault break clause

## 'By LGPS Funds, for LGPS Funds'

The National LGPS Frameworks are uniquely open to all LGPS Funds and administering authorities nationally for the procurement of services from a wide range of qualified providers.

## Frameworks available include:

- Actuarial, Benefits and Governance Consultancy Services
- Global Custody Services
- Legal Services
- Passive Investment Management Services
- Investment Management Performance and Cost Monitoring and Reporting Services
- Stewardship Services
- Third Party Pensions Administration and Pensions Administration Support Services
- Investment Management Consultancy Services
- Transition Management and Implementation Services

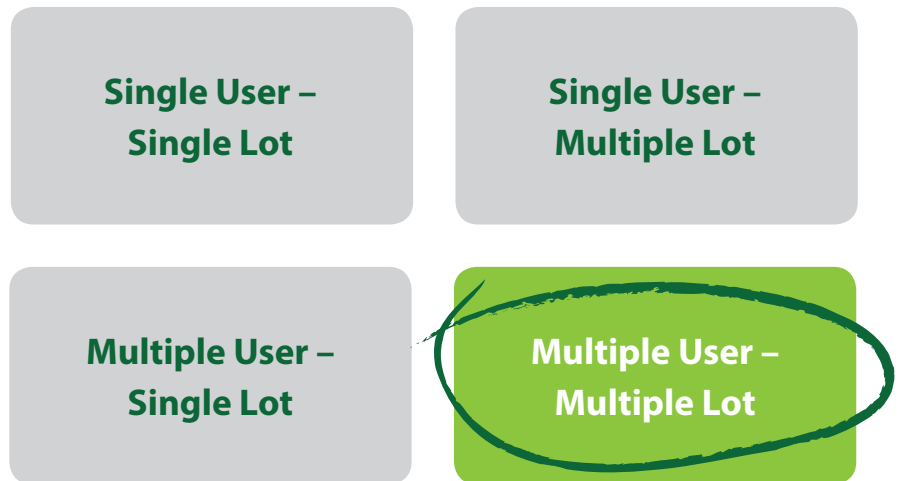
Agreed terms and conditions are provided so users can simply 'call-off' the framework to meet their requirements, therefore removing costly and time-consuming legal work from the procurement process.

The National LGPS Frameworks are directly in line with the Government's agenda for LGPS collaboration and delivering greater value for money.

Using the framework will help Funds easily access the marketplace and leverage better prices, while crucially still supporting local decision making and service requirements.

### **Different types of frameworks**

There are several different types of framework arrangements. The National LGPS Framework for Member Data Services is a multiple user, multiple lot framework – i.e. all users identified on page 9 of this document can use the framework to procure a range of services.



# Why should I use this framework?

Procurement can take significant time and money, both for the awarding authority and service provider.

The National LGPS Framework is fully compliant with the Public Contracts Regulations 2015. It reduces the time and costs associated with the procurement process by offering a facility that has already been competitively tendered.

It aims to deliver quick and easy access at the best possible price to high- quality, efficient and effective Member Data Services for all LGPS administering authorities and any of their participating employing authorities.

## **The main benefits include:**

### **Easy access to pre-selected, specialist service providers**

The National LGPS Frameworks provide an easy access route to pre-selected specialist providers who are best placed to deliver Member Data Services to the LGPS..

### **Collaboration and partnership**

The National LGPS Frameworks have been created in line with the Government's wish for LGPS Funds to seek ways of extending joint working and collaboration. They are helping to realise potential efficiencies and are giving LGPS Funds a clearer voice within the marketplace, along with helping to share knowledge, information, experience and best practice.

### **Flexibility**

National LGPS Frameworks reduce the time and cost associated with a full procurement exercise, which in turn allows you to be more flexible with the planning and running of any tender process via Further Competition. There is also the option to Direct Award through any of the Lots on this Framework.

### **Best practice procurement**

Each of the service providers on the National LGPS Frameworks have been subject to a rigorous procurement process, ensuring they offer the scope and quality of 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 service 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.

### **Efficiency**

The framework removes the need for you to conduct full tender exercises or lengthy service provider evaluations, saving the time and costs associated with procurement exercises. Our easy ordering process makes the National LGPS Framework simple to access and use.

### **Value for money**

Ceiling prices help to ensure that value for money is consistently achieved.

### **Quality of service provision**

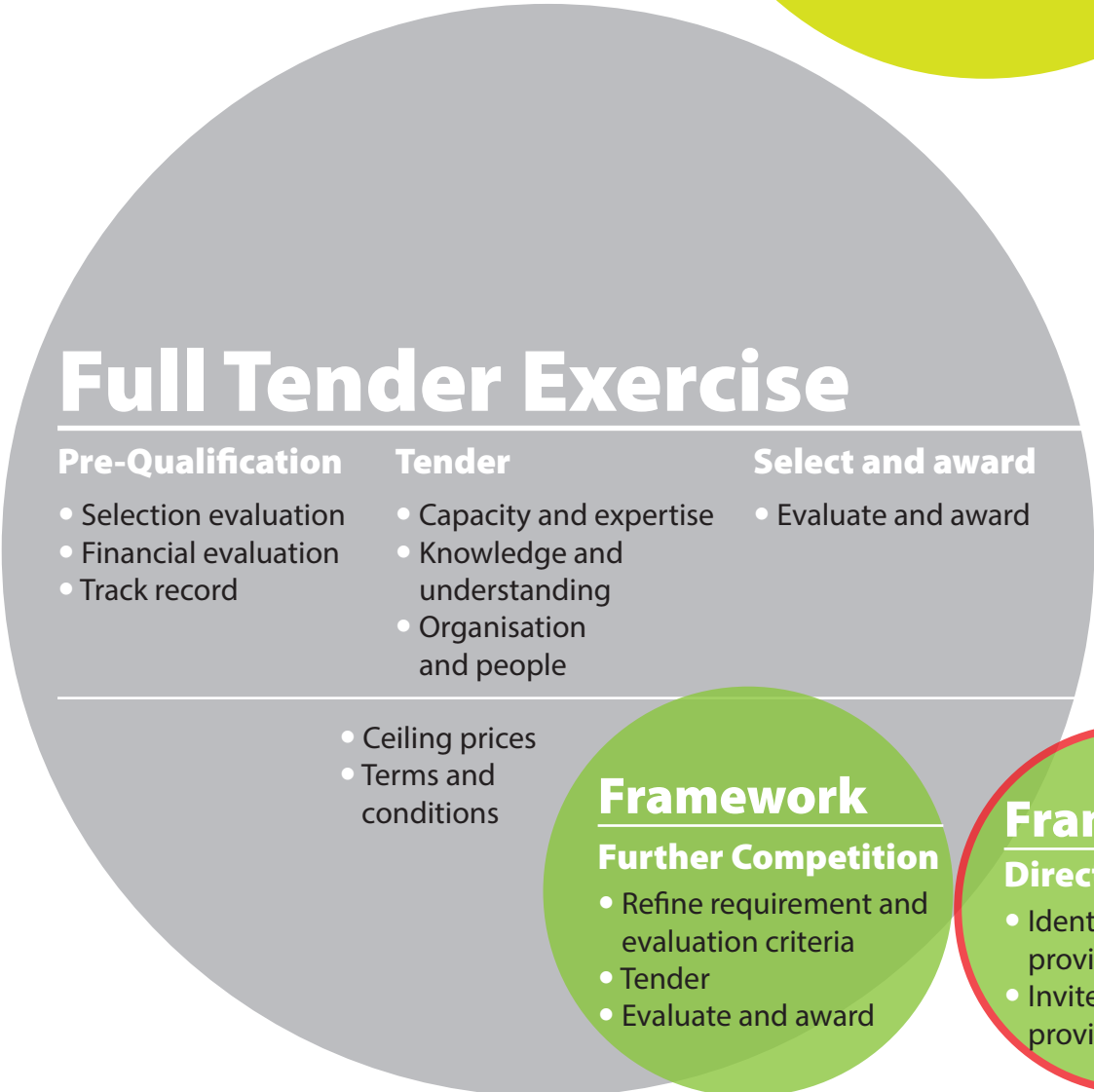
The experience, expertise and commitment to quality of a service provider are assessed at the time of the initial competition. Your satisfaction with the service providers' performance is monitored on an ongoing basis.

### **No fault break clause**

You have the right to suspend or terminate the contract at any time by giving written notice to the service provider.

# Framework route vs full procurement

The **National LGPS Framework** for Member Data Services significantly reduces the **time and cost** associated with procurement by offering a facility that has **already been competitively tendered**.



6 - 9 months without framework	reduced to...	4 - 6 weeks with framework	or...	Same day with framework
-----------------------------------	---------------	-------------------------------	-------	----------------------------



# Who can use the Framework?

The National LGPS Framework for Member Data Services is a multi-provider framework agreement primarily in support of the Local Government Pension Scheme.

## The framework may be used by:

- Any administering authorities and any of their participating employing authorities as defined in the Local Government Pension Scheme Regulations 2013 SI 2013 No.2356 (as amended) and the Local Government Pension Scheme (Administration) (Scotland) Regulations 2008 as amended by SSI 2011/349;
- The Committee (the NILGOSC) and employing authorities as defined in the Local Government Pension Scheme (Administration) Regulations (Northern Ireland) 2009 / SRNI 2009/33;
- The Board of the Pension Protection Fund [www.pensionprotectionfund.org.uk](http://www.pensionprotectionfund.org.uk);
- Any other administering authority or organisation of a public sector pension scheme or any public sector body that requires pensions related services; and
- Any Common Asset Pool or Collective Investment Vehicle established by or on behalf of an administering authority or group of administering authorities; any Local Government Pension Fund(s) or groups of Pension Funds; or any bodies, organisations or companies established by them for the purpose of operating on a collective basis.

“Enterprising and effective collaborations like this are the type of approach we are keen to encourage.”

**Francis Maude**

Former Minister for the Cabinet Office

# What services are covered by this framework?

The National LGPS Framework for Member Data Services has four separate Lots:

Lot	Description	Number of Service Providers appointed to the framework
1	Address Tracing and Correction Services	4
2	Mortality Screening Services	4
3	Overseas Address Tracing and Correction Services	2
4	Overseas Mortality Screening Services	1

Some providers offer Additional Services. These are listed on page 12 and further detail is available in the Supplier Catalogues.

Q.

**Can we add in any service requirements at the Further Competition stage, even if they are not covered by the framework’s more general specification?**

A.

Yes, as long as these are in areas within the overall scope. You may want to request that service providers give specific examples for any questions you ask.

## Lot 1 – Address Tracing and Correction Services

**Address tracing for all or a subset of scheme members which includes but not limited to:**

- Verification that member is at the given address, with indicative confidence of match;
- If verified, where the address is incomplete or inaccurate provide corrected address;
- If not verified find and provide a correct address, with indicative confidence of match;
- Inform of ‘no trace result’.
- Bulk and individual tracing services on a one off, ad-hoc or regular (e.g. monthly) services, or combination thereof;
- Multiple level of tracing services.
- Ability to accept and return all data electronically via a secure and encrypted method
- Data and returns to be in CSV or Excel spreadsheet format or as agreed by the awarding authority.

## Lot 2 – Mortality Screening Services

### **To provide mortality screening services including, but not limited to:**

- Mortality screening for all or a subset of scheme members and indicative confidence of match and data source.
- Utilisation of UK wide databases including historical tracing option.
- Bulk and individual mortality screening services on a one off, ad-hoc or regular (e.g. monthly) services, or combination thereof.
- Ability to accept and return all data electronically via a secure and encrypted method.
- Data and returns to be in CSV or Excel spreadsheet format or as agreed by the awarding authority.

## Lot 3 – Overseas Address Tracing and Correction Services

### **To provide overseas scheme member verification services including but not limited to:**

- Address tracing for all or a subset of overseas scheme members which includes but not limited to:
- Verification that member is at the given address, with indicative confidence of match;
- If verified, where the address is incomplete or inaccurate provide corrected address;
- If not verified find and provide a correct address, with indicative confidence of match;
- Inform of 'no trace result'.
- Bulk and individual overseas tracing services on a one off, ad-hoc or regular (e.g. monthly) services, or combination thereof;
- Multiple level of tracing services.

## Lot 4 – Overseas Mortality Screening Services

### **To provide overseas Mortality Screening services including but not limited to:**

- Mortality screening for all or a subset of overseas scheme members and indicative confidence of match and data source.
- Bulk and individual overseas mortality screening services on a one off, ad-hoc or regular (e.g. monthly) services, or combination thereof.
- Ability to accept and return all data electronically via a secure and encrypted method.
- Data and returns to be in CSV or Excel spreadsheet format or as agreed by the awarding authority.

### **Additional Services**

#### **In addition, awarding authorities may require additional optional services which include but are not limited to:**

- Provision of self-service search facility for the awarding authority.
- Provision of corrected and ex-directory telephone numbers.
- Provision of death certificates for deceased members.
- Ability to contact traced members on behalf of the awarding authority.
- Spouse Tracing, Marital Status checking and Spouse Identification.
- Identity and associated data verification:
- Verification of data for all or a subset of scheme members, including but not limited to the Pension Regulator's Common Data set, and the replacement of data where available/required;
- Bulk and individual data verification services on a one-off, ad-hoc or regular (e.g. monthly) services, or combination thereof;
- Verification of existence of overseas scheme members.

**There are four service providers on the framework, across the four lots:**

Service Provider	Lot 1	Lot 2	Lot 3	Lot 4
Accurate Data Services	✓	✓		
GB Group PLC	✓	✓		
JLT Employee Benefits	✓	✓	✓	
Target Professional Services	✓	✓	✓	✓

**In order to be appointed to the framework, providers have demonstrated they have the right expertise and capacity to provide these services.**

**While each provider successfully passed a minimum quality threshold, they are not all the same.**

**It is really important that you focus clearly on what you as a Fund need, so you select the most appropriate provider.**

Further detail on each service provider can be found in the **Supplier Catalogues**. These include an overview of each provider’s service descriptions, their team structures and other relevant information.

The National LGPS Framework for Member Data Services commenced in September 2018 and is open for 4 years.

**Contracts awarded under the Framework may be awarded for up to 6 years and cannot extend beyond 30 September 2024.**

# How much does it cost and what will I save?

Q.

**Are pension funds that use the National LGPS Framework bound by the prices set out in the tender responses, or is there scope for price negotiation at an individual fund level?**

A.

The prices set out in the framework are the **maximum** rates, but we would expect these to be **reduced** at **Further Competition** or at **Direct Award** if applicable. Please note however that this is competition not negotiation. The defined pricing structure aims to eliminate hidden extras and allow for easy comparison at the evaluation stage.

## Joining Fee

The joining fee of £500 gives you access to all lots of the framework and all documentation, including the pre-agreed terms and conditions, ceiling prices and comprehensive guidance notes.

Once you have joined the framework you can undertake as many Direct Awards or Further Competitions, from as many Lots, as you wish.

## Pricing

Ceiling prices for all service providers on the National LGPS Framework for Member Data Services are included in the **Pricing Schedules**.

All prices are maximum rates and are subject to further reduction at **Further Competition** or **Direct Award** if applicable.

## Travel and subsistence

Service provider prices are inclusive of travel, subsistence and any other expenses.

# How were the service providers chosen?

Q.

**Under the National LGPS Framework for Member Data Services are providers scored or ranked? If so, are we under any obligation to use the highest scoring provider?**

A.

Service providers are not ranked within the framework. All service providers appointed to the framework are deemed capable, and therefore should be treated in the same way. The framework would not oblige you to use any specific service provider. If you wished to make an appointment under the framework you would either undertake a **Further Competition** or **Direct Award**, depending on the nature of your specific requirements.

## Expectations of quality

As part of the procurement and tendering process, the successful service providers demonstrated proof of the following general expectations:

- Experience and knowledge in the provision of Member Data Services (including but not limited to address tracing and correction, mortality screening overseas address tracing and corrections and overseas mortality screening services);
- Strong knowledge and experience of the regulatory framework and operational environment for LGPS Funds;
- An ability to leverage economies of scale for the benefit of framework users;
- Excellent communication skills;
- Appropriate regulatory oversight;
- An innovative approach in delivering solutions to framework users.

**In order to be appointed to the framework, providers have demonstrated they have the right expertise and capacity to provide the services detailed on pages 10 to 12.**

**While each provider successfully passed a minimum quality threshold, they are not all the same.**

**It is important you focus clearly on what you need, so that Further Competition or Direct Award helps you select the most appropriate service provider.**

# Joining the National LGPS Framework for Member Data Services

If you would like to know more or to make use of the National LGPS Framework for Member Data Services please complete and return a copy of the **Option Form** (Appendix 1) along with a signed **Confidentiality Statement** (Appendix 2)

Via this form you can opt to receive more details or to join the framework.

## **Confidentiality Statement**

We cannot share any of the commercially sensitive details of the framework with you until you have completed and returned a **Confidentiality Statement** (Appendix 2).

Once we have received your **Confidentiality Statement** we will send you a set of **Guidance notes**, along with a comprehensive Call-off pack including a **Guide to Call-off** and an **Example Invitation to Further Competition Template**.

We will also send you **Call-off terms and conditions**, a **Pricing Schedule** and **Supplier Catalogues**, which include service descriptions and biographies/CVs.

## **Members' Access Agreement**

To use the National Framework, you must sign and return two copies of the **Members' 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 the Framework.

If you opt to join the framework we will send you two copies of the **Members' Access Agreement** to sign and return, along with all the other framework documentation. An example of the **Members' Access Agreement** is at Appendix 3. We will also send you an invoice for the joining fee.



## Anything else I need to know?

If you have already signed a **Members' Access Agreement** for another framework but wish to join this framework, or you have previously signed a **Members' Access Agreement** for the Member Data Services Framework and wish to join another lot, please complete and return **Annex A Notice letter template** which is attached to your signed Members' Access Agreement. Alternatively, please contact us and we can send you over a template if required.

If you have any further questions or need any further detail before using the framework, please contact us and we will be happy to help.

### **Audit**

As part of its contract management function, Norfolk County Council, as the letting authority, has the right to conduct independent auditing of the service provider's processes, procedures and application of their rates.

### **Financial arrangement between Norfolk County Council and service providers**

Service providers are required to pay Norfolk County Council, as the letting authority, a flat rebate of 2% of all contracts let under this National LGPS Framework each year, for work invoiced during the financial year.

This rebate is used to cover the administration costs of the framework.

# FAQs

## Question 1

### Who can use the framework?

**A.** Any administering authorities and any of their participating employing authorities as defined in the Local Government Pension Scheme Regulations 2013 SI 2013 No.2356 (as amended) and the Local Government Pension Scheme (Administration) (Scotland) Regulations 2008 as amended by SSI 2011/349;

The Committee (the NILGOSC) and employing authorities as defined in the Local Government Pension Scheme (Administration) Regulations (Northern Ireland) 2009 / SRNI 2009/33;

The Board of the Pension Protection Fund [www.pensionprotectionfund.org.uk](http://www.pensionprotectionfund.org.uk);

Any other administering authority or organisation of a public sector pension scheme or any public sector body that requires pensions related services; and Any Common Asset Pool or Collective Investment Vehicle established by or on behalf of an administering authority or group of administering authorities; any Local Government Pension Fund(s) or groups of Pension Funds; or any bodies, organisations or companies established by them for the purpose of operating on a collective basis.

## Question 2

### When can I Direct Award and when do I have to run a Further Competition?

**A.** You can **Direct Award** from any Lot on the Framework 'as and when' you have a specific requirement or alternatively, you can run a **Further Competition** inviting all suitable suppliers to bid.

### Question 3

**Under the National LGPS Framework for Member Data Services are service providers scored or ranked? If so, are we under any obligation to use the highest scoring provider?**

**A.** Service providers are not ranked within the framework. All service providers appointed to the framework are deemed capable, and therefore should be treated in the same way. The framework does not oblige you to use any specific service provider. If you wished to make an appointment under the framework you would either **Direct Award** or undertake a **Further Competition**, depending on the nature of your specific requirements.

### Question 4

**If a list of suitable providers is provided (un-ranked), are we able to decide which firms to invite to tender?**

**A.** This depends on the nature of your requirements and which Lots they fall under. You are able to **Direct Award** from all Lots on this Framework. Alternatively, you can run a **Further Competition** and it is best practice to invite all capable service providers to take part. By nature of their successful award to the framework, all service providers on the National LGPS Framework for **Member Data Services** are deemed capable. You would need a clear and justifiable reason to exclude any service provider. Please see the **Guide to Call-off** at Appendix 1 for more information.

### Question 5

**Are pension funds that use the National LGPS Framework bound by the prices set out in the tender responses, or is there scope for price negotiation at an individual fund level?**

**A.** The prices set out in the framework are the **maximum** rates, but these may be **reduced** at Call-off stage. Please note however that this is competition not negotiation. The list of ceiling prices is fixed so that there are no hidden charges and prices are comparable and transparent.

### Question 6

**How much does it cost to join the framework and what do we get?**

**A.** The joining fees of £500 give you access to the framework (and all documentation, including the pre-agreed terms and conditions, ceiling prices and comprehensive guidance notes).

Once you have joined the framework you can undertake as many Direct Awards or Further Competitions as you wish.

Please see the joiner's fee details on Page 14 for more information.

### Question 7

#### Is there scope for us to agree/alter contractual terms and conditions, or are these essentially set at a framework level?

**A.** The Public Contracts Regulations 2015 (“the Regulations”) specifically state that the parties should not substantially amend the terms laid down in a framework agreement.

There is an acknowledgement though that you may need to make non-material changes to the terms (e.g. to change the time for supply of the relevant products). However, you are not entitled to make a material change to the terms (e.g. by adding a new service) to the extent that it might affect the identity of the service providers capable of meeting the requirements.

This prevents the distortion of competition by ensuring that service providers are not excluded solely on the grounds that they were unable to meet the original requirements.

### Question 8

#### What variations will be considered non-material?

**A.** The regulations do recognise that the terms of a framework, or of specific contracts, may need to be supplemented in certain situations.

Where you are running a **Further Competition** under a multi-supplier arrangement, you may supplement the terms.

In these circumstances, you would do so where you need to amend the terms to ensure that they capture the requirements more precisely, or provide additional terms on the basis that these have been referred to in the framework. **This does not allow a fundamental re-write of the terms** but recognises that it is not possible or practical to attempt to make provision for every eventuality, particularly in a multi-supplier environment.

However, there is a requirement that any supplemental terms align with and are based on the terms referred to in the framework agreement or the original request for tender. It was for this reason that careful consideration was given to the development of these documents when setting up this framework.

### Question 9

#### Will we be able to stipulate our own contract termination conditions?

**A.** You have the right to suspend or terminate the contract with immediate effect at any time by giving written notice to the service provider as set out in the **Call-off terms and conditions.**

### Question 10

#### When we do our own tenders we may have a shortlist in order of highest score and use the interviews to verify the scores from the ITT, plus add an additional score, e.g. for communication. Can we still do this if using the National LGPS Framework?

**A.** You may wish to include service provider interviews as part of your Further Competition process – for example, if you want to meet your client relationship manager.

If you decide to include scored interviews as part of your **Further Competition** process, you will need to invite all service providers who have a realistic chance of winning. You should make it clear in your Invitation to **Further Competition** who you will interview e.g. the top three scoring bids who have a realistic chance of winning.

If you choose to use interviews only for clarification and to ratify the scores you have awarded as part of the Quality and Service Fit sections, you may only want to interview suppliers that have a realistic chance of winning.

Whichever approach you take, you must clearly state your intentions upfront in your **Invitation to Further Competition.**

Please try to avoid carrying out unnecessary interviews for providers who have no realistic chance of being awarded a contract.

### **Question 11**

#### **How does the Public Services (Social Value) Act 2012 apply to Framework Agreements?**

**A.** Procurers and commissioners must consider the provision of the Act when procuring an above threshold framework agreement for public services. The Act states that Authorities should consider economic, social and environmental aspects that can affect citizens when they are tendering for requirements. This might involve consultation with local groups and the voluntary sector.

Norfolk County Council have assessed this Framework Agreement in the context of the Act, and have determined that it meets the requirement of Economy, in that it is anticipated that it will generate savings for the public purse in the local area of each user pension fund.

It is anticipated that this will be achieved through the rebate structure and increased competition in provision of Member Data Services to user pension funds and authorities. In addition, this is an innovative procurement approach for the LGPS as a whole and it is anticipated it will generate savings through speeding up lengthy procurement processes for each user fund.

### **Question 12**

#### **Once we have completed our Further Competition are we required to publish a Contract Award Notice?**

**A.** There is no requirement to place a Contract Award Notice for call-offs against framework agreements.

# Glossary

## **Administering authority**

An authority that administers a Local Government Pension Scheme (LGPS).

## **Award criteria**

The criteria used to determine whether a service provider can meet the requirements set by an awarding authority.

## **Awarding authority**

An LGPS authority looking to award a contract to a service provider within the National LGPS Framework.

## **Call-off**

The act of an awarding authority procuring a service provider from the National LGPS Framework.

## **Call-off contract**

A legally binding agreement for the provision of services made between the awarding authority and service provider.

## **Call-off criteria**

The criteria used to evaluate service providers at the Further Competition stage.

## **Ceiling prices**

The maximum prices that service providers can charge as part of the National LGPS Framework. These are subject to further reduction at the Call-off stage.

## **Competitively tendered**

The process of circulating detailed specification of services to a number of potential providers, who submit bids for evaluation ahead of an award being made. In this instance it refers to the process undertaken by Norfolk Pension Fund and the “founding authorities” when appointing service providers to the National LGPS Framework.

## **Confidentiality statement**

A statement to be signed by potential joiners of the National LGPS Framework, agreeing to respect the confidentiality of any commercially sensitive information made available.



### **Direct award**

Where a contract for services is awarded based solely on the information provided in the **Supplier Catalogues** without the need for **Further Competition**.

### **Further Competition (sometimes referred to as mini-competition)**

Competitions run by awarding authorities in order to evaluate service providers when awarding contracts.

### **Initial competition**

The procurement exercise that was carried out in order to appoint service providers to the National LGPS Framework.

### **Invitation to Further Competition**

As part of the **Further Competition** stage, awarding authorities will invite service providers to quote for the services they have set out in their detailed requirements.

### **Joining fee**

The fee applicable to those who wish to join the National LGPS Framework for Member Data Services (See page 14 for more detail).

### **Letting authority**

The authority that provides access to the National LGPS Framework (in this case Norfolk County Council).

### **LGPS**

The Local Government Pension Scheme.

### **Members' Access Agreement**

This is a legal document between your authority and Norfolk County Council (the Letting Authority for this framework). The purpose of this agreement is to regulate the liabilities that may arise as a result of use of the framework.

### **OJEU**

OJEU stands for the Official Journal of the European Union. This is where the contract notice for the National LGPS Framework was published. All public sector contracts over a published threshold are required to be published in the OJEU.

### **Order Form**

The order submitted to the service provider by the awarding authority in accordance with the National LGPS Framework. It sets out the description of the services to be supplied including, where appropriate, key personnel, premises, timeframe, deliverables and quality standards.

### **Service provider**

A company that provides services as part of the National LGPS Framework.

### **Terms and conditions**

In this instance, the Call-off terms and conditions that, along with an Order Form, comprise a call-off contract.

## Contact us

If you have any questions about the National LGPS Frameworks or would like to know more, please contact us at the following:

 **NationalLGPSFrameworks@norfolk.gov.uk**

 **01603 495922**

 **The Norfolk Pension Fund**

(National LGPS Frameworks)

4th Floor, Lawrence House, Norwich NR2 1AD