

Eleven LGPS Funds have established a new National Framework to provide **Pensions Administration Software** and related services, primarily in support of the LGPS. The scheme will provide **benefit entitlement calculations and payments** in compliance with relevant LGPS Regulations, with optional additional requirements such as an **online portal** for use by the various Employer organisations participating in the Pension Scheme. Using this Framework will **reduce the time and cost associated with procurement** by offering a facility that has already been competitively tendered.

PROVIDERS

- **Aquila Heywood Ltd**
- **Civica UK Ltd**
- **Equiniti**

FUNCTIONALITY BESPOKE TO YOUR REQUIREMENTS, INCLUDING:

- Core pension administration system
- Data and document requirements
- Workflow and workload management
- Reporting including data quality
- Administration casework
- Bulk processes
- Calculations
- Payroll and payroll interface
- Employer and Member accessibility
- Technical architecture compatibility
- Implementation approach
- Support and maintenance
- Hosting services
- Additional services

KEY DETAILS

- *Dates of operation:*
April 2020 to April 2024
- *Contract award length:*
Initial period up to **7 years** with the option to extend to a maximum of **10 years**
- *Joining fee:* **£8,000**
- *Structure:* **Single Lot — Multi-provider**
- *Procurement route:*
Further Competition only

FOUNDING AUTHORITIES:



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**



WHY SHOULD I USE THIS FRAMEWORK?

- **Easy access to pre-selected, specialist providers** in Pensions Administration Software for the LGPS.
- **Efficiency** - 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. This allows you to be more flexible in planning and running any tender process via Further Competition.
- **Best practice procurement** - Each provider has 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.
- **Specification of Requirements** - This is a comprehensive, in-depth specification created by the Founding Authorities working alongside specialist pensions administration consultants. You have the flexibility to amend the document to achieve the best outcome for your organisation.
- **Agreed Call-off Terms and Conditions** - produced by a specialist law firm and contractually agreed with providers.
- **Comprehensive supporting documentation** - In addition to the Specification of Requirements and Call-off Terms and Conditions, we provide a comprehensive pack with Provider Catalogues, Guide to Further Competition, Example Invitation to Further Competition and Award Letters.
- **Flexible contract length** – contracts can be awarded for an initial period of up to 7 years with the option to extend up to a maximum length of 10 years from the Further Competition Award date.
- **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.

Full Tender Exercise

Tender

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

Select and award

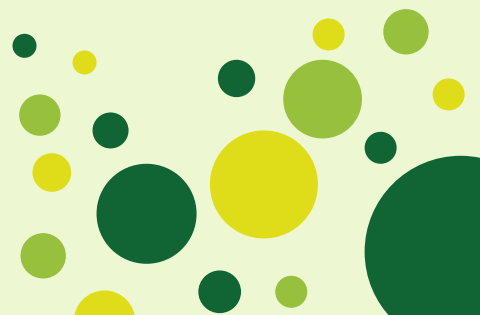
- Evaluate and award

- Terms and conditions

- #### **Framework**
- #### **Further Competition**
- Refine requirement and evaluation criteria
 - Further Competition
 - Evaluate and award

All the stages in the grey circle have been undertaken by the National LGPS Framework Founding Authorities in setting up the Framework through a full OJEU procurement.

The green circle highlights what you need to do at Further Competition.



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.

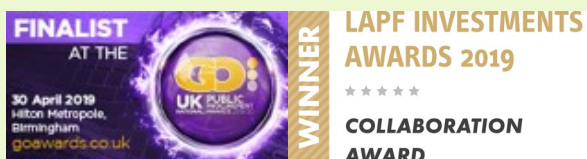
Once we have received your signed **Confidentiality Statement and Option Form** we will share the full set of documentation through our online Document Portal, including:

- **Guidance Notes**
- **Appendix 1 – Guide to Further Competition**
- **Appendix 2 – Specification of Requirements**
- **Appendix 3 – M2 and optional Proposals**
- **Appendix 4 – Example Invitation to Further Competition**
- **Appendix 5a – Example Pricing Schedule**
- **Appendix 5b – Example Price Scoring Calculator**
- **Appendix 6 – Call-off Terms and Conditions (including Schedules A - H)**
- **Appendix 7 – Example Award Letters**
- **Appendix 8 – Order Form**
- **Appendix 9 - 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.

You will also receive an invoice for the **£8,000 Joiner's Fee**. 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 set-up costs and ongoing support and administration of this framework.

You will be able to carry out your **Further Competition**.



CONTACT US:

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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.

To view the other services available via National LGPS Frameworks, please visit www.nationallgpsframeworks.org