

# Customer Guidance

This document aims to cover many of the questions Customers might have about the Futures Framework and how it will work. The guidance is intended as a high level generic guide and is not intended to cover department specific issues. If you need help or have questions please contact UK SBS ([professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk)) and your own department.

This Guidance will be kept under review as the Framework is used. It should be consistent with the terms of contracts set out under the Framework, but please refer to contracts for the final position.

## The Futures Framework

The Futures Framework is a procurement agreement that helps your team or organisation procure independent expertise and capacity to strategically explore the future on complex issues. All Framework call-offs should go through the UKSBS inbox ([professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk))

## Framing Customer Project Specification to maximise value

We recommend that any communications with Suppliers focus on the questions Customers want answered and their desired outcomes of any work, and suggest that, where possible, Customers avoid outlining a specific process, tool, or output.

Depending on the complexity of the issue and their capabilities each Supplier may propose different approaches to tackling Customer's question or delivering Customer's outcomes. This will give Customers a greater variety of options to choose from and the chance to engage with innovative ideas and approaches, and is more likely to result in a higher quality service that best matches the need.

We recommend Customers use the Supplier Directory, Specialism Document, Rate Card, and Prospectuses to help guide conversations with Suppliers. The Directory and Specialism Document outline many of the questions Customers may want answers to. Customers should also make sure that Suppliers, if they have experience, provide examples of when they have carried out work similar to the Customer's request. This way Customers can compare previous outcomes with their desired outcome. These steps should help make sure Customers get the best service for the lowest cost.

You can email the UKSBS framework managers to request copies of the Supplier Directory & Case Studies, Specialism Document and Rate Card. Furthermore, you can find links to suppliers' prospectuses via the [Framework Website](#).

When Customers are ready to sign a contract, they should be clear on what services they are purchasing and how this will help deliver the desired outcomes.

If Customers are struggling with any part of the process, the Framework Managers can assist with the administrative processes and provide the Supplier Specialism Document and Rate Card - contact [professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk). The Futures Team can assist Customers with types of services available and what might suit them best. For guidance contact [futures@go-science.gov.uk](mailto:futures@go-science.gov.uk).

## Overview of Purchasing Process

The Framework is available to a wide range of public organisations and institutions. If you are unsure if you qualify as a customer please consult the [Framework Website](#) and consult with UKSBS ([professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk)).

It is important to note that a customer can cancel the Process at any time. The Customer is not obliged to award any Contract.

At any time during the **Further Competition Procedure**, the Customer may go back to any previous stage in the process and amend requirements.

The Supplier may ask clarification questions relating to the Customer’s requirements. The Customer’s responsibility is to specify how clarification questions can be asked and when the clarification period will close. Questions and responses will be anonymised and made available to all Framework Suppliers.

There are two ways a customer may award a contract **Direct Award** and **Further Competition**. Customers should ensure that award route is proportionate to the complexity and value of the Customer's *Project Specification*. More information on both approaches can be found below.

An overview of the process can be seen in Figure 1 and is explained in more detail below.

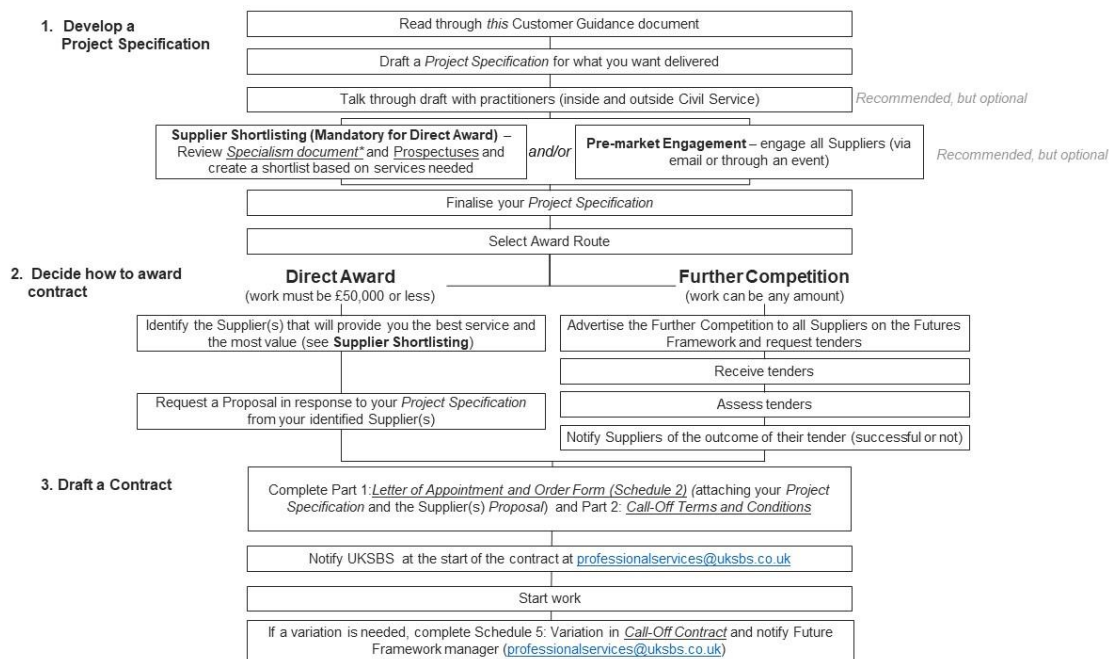


Figure 1: How to procure services

## How to procure services

### Step 1: Develop a Project Specification.

The Customer shall develop a Project Specification detailing what is needed from the Supplier and the outcome that the Supplier shall be required to deliver. As a minimum the Project Specification must include:

- an outline of the business challenge/issue, including any known targets
- details of any mandatory activities, channels or specialist services that should be included within any proposed solution
- the evaluation method and criteria for assessing Framework Suppliers against the Project Specification, based on the Further Competition Award Criteria together with a timetable for the evaluation process

- d) a request for interested Framework Suppliers to respond
- e) the Supplier's Proposal due date

The Customer is advised but not mandated to include the below in the Project Specification:

- a) a budget range
- b) geographical location of work (if required)
- c) any security clearances needed
- d) a clarification period for Suppliers to ask questions about the Project Specification. The timeframe for this clarification period shall be outlined in the Project Specification
- e) any other information that the Customer considers necessary to enable Suppliers to submit a Proposal

The Customer is advised to engage with Framework Suppliers before starting the below stages, including providing preliminary details of the requirement for Framework Supplier feedback.

During this process, the Customer may then choose to undertake one or more of the optional stages set out below:

- a) **Pre-Market Engagement (Recommended but Optional).** If a customer chooses to undertake pre-market engagement, the Customer:
  - i. shall send the draft Project Specification to all Framework Suppliers asking for a response for the purposes of assisting with market engagement, as detailed within the Project Specification
  - ii. may hold a market engagement event where they shall invite all Framework Suppliers, in person or online, to develop the Project Specification
  - iii. may choose to update the Project Specification and re-issue the Project Specification to all Framework Suppliers
- b) **Supplier Shortlisting (Mandatory for Direct Award).** If a customer chooses to undertake Supplier shortlisting, the Customer:
  - i. shall review the specialism documents for all Suppliers on the Framework and only proceed with Framework Suppliers that have responded 'Yes' to the required specialism.
- c) **Finalise your Project Specification (Required).** The Customer shall undertake the written Proposal stage for all Contracts under this Framework Agreement, the Customer:
  - i. shall send the Project Specification to all Framework Suppliers (or only those shortlisted Suppliers if the Customer has undertaken Supplier shortlisting)
  - ii. shall score the Supplier's Proposal against the evaluation method and scoring system outlined in the Project Specification.

#### Step 2: Decide how to award contract

There are two options available for awarding a contract: **Direct Award** and **Further Competition**. Customers should ensure that award route is proportionate to the complexity and value of the Customer's *Project Specification*. The Futures Framework is set up such that Direct Award can be up to the value of £50,000. The decision is ultimately up to the Customer.

- a) **Direct Award.** If the Customer chooses to Direct Award under the Framework, which is allowable up to £50k, the Customer shall:
  - i. Undertake a shortlisting exercise;

- ii. Review the shortlisted Suppliers prospectuses to determine the most suitable Supplier;
- iii. Complete Framework **Schedule 4, Letter of Appointment**, which includes the Order Form and Terms.

**b) Further Competition**

Further Competition Award Criteria

The Customer will evaluate the Supplier’s Proposal against the following criteria to determine which of the Framework Suppliers provides the most economically advantageous solution from the perspective of the Customer. For the avoidance of doubt the most economically advantageous solution will not necessarily be the lowest price solution.

Weightings and sub-weightings for the evaluation criteria will be set by the Customer and must add up to 100%.

Criteria	Percentage Weightings
Quality	60 - 95%
Price	5 - 40%
TOTAL	100%

*Assessing the Quality of a Supplier Offer*

There are various ways you may wish to go about assessing the quality of a Supplier’s offer. This should largely depend on the size of the project and the route you have chosen to follow. It is up to the Customer to decide this and the weighting between quality and price.

You may want to think about some of the following when creating your evaluation criteria:

**1) Skills and Expertise**

- a) Has the Supplier got a clear track record (or clear potential) for delivering what is needed in response to your Project Specification?
- b) Does the Supplier outline Processes, Techniques, Tools and Products that meet the demands of your Project Specification?

**2) Flexibility and Innovation**

- a) Does the Supplier’s offer provide clear benefits beyond what you already have available?
- b) Does the Supplier show an ability to innovate and respond to create a bespoke service tailored to your specific demands?
- c) Does the Supplier offer new innovative tools for the task and is it clear why this is good value for money?
- d) Does the Supplier’s suggested approach demonstrate flexibility in responding to external factors?

**3) Communication Skills**

- a) Does the Supplier have a track record (or potential) of clearly communicating complex issues to government and public bodies?
- b) Does the Supplier have a variety of communication techniques and an ability to communicate complex ideas?
- c) Does the Supplier have the ability to communicate to different levels of seniority in a clear and concise manner?
- d) Is the Supplier able to stimulate debate and conversation on a specific issue?

#### 4) Ability to Deliver

- a) Does the Supplier clearly demonstrate what resources they will offer and how they plan on accessing them?
- b) Does the Supplier show an awareness of project delivery in order to meet your timeframe?
- c) Does the Supplier offer access to expert resources to help you understand the content of work?

#### Step 3: Draft a contract

Upon deciding which Supplier to award to, the Customer must complete the Letter of Appointment and Order Form (Annex D) and share these with the Supplier. We also request Customers send the final signed Letter to [professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk). The reference for this Framework is **PS 22410**

**Suppliers must supply customers with the Order Number for documents.**

**If contract is over £12,000 (inc VAT), it is a requirement that it is published on Contracts Finder. Please contact your organisation's commercial team for assistance with this.**

#### *Completing the Letter of Appointment*

There are two parts to the Letter of Appointment you will need to complete to call-off a contract, these should all be compiled within a single document. Please send final signed copies to UKSBS ([professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk)).

*You can find the necessary documents in the Framework Agreement, hosted on Gov.uk along with this guide*

#### 1) Part 1

- a) *Schedule 2 Letter of Appointment*
  - i) Complete the boxes provided and ensure both parties sign
- b) *Annex D- Order Form*
  - i) Complete the boxes provided and ensure both parties sign
- c) *Annex A- Customer Project Specification*
  - i) Insert a copy of the Project Specification created in Step 1 of the [Procurement Process](#)
- d) *Annex B- Supplier Proposal*
  - i) Insert a copy of the Supplier Proposal submitted in Step 2 of the [Procurement Process](#)

#### 2) Part 2

- a) *Call-Off Contract Terms and Conditions*
  - i) P.4- Dates of contract, Supplier and Customer info
  - ii) Schedule 2 (pp.37-38), Statement of Work - Completed and signed by both parties
  - iii) Schedule 6 (if Applicable) (pp.74-76) - To be completed by Customer

#### Step 4: Notifying the Framework Contract Managers of project completion

We request that Customers inform UKSBS at [professionalservices@uksbs.co.uk](mailto:professionalservices@uksbs.co.uk) on completion of a contract. They will be asked to provide feedback on delivery of the project using a standardised evaluation form, to support monitoring and evaluation of the Framework.