



Charities Buying Group
saving money for UK charities since 2002

Framework

For the provision of Multifunctional
Devices and Associated Digital Solutions

User Guide



Contract managed by

 **Dukefield
Procurement**
Part of the Dukefield Group

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1 INTRODUCTION

Charities Buying Group has put in place a UK compliant framework for the provision of Multifunctional Devices and Associated Digital Transformation Solutions - framework reference number CBG/DU/MFD/01. This is a proactive, best value, collaborative framework that can deliver your entire printing and digital procurement needs.

2 FRAMEWORK SUMMARY

The Multifunctional Devices and Associated Digital Transformation Solutions framework is open to all public sector bodies and consists of a single lot.

The framework provides access to a range of devices from multifunctional devices from small desktop devices through to large reprographic units across a number of specification ranges defined by print speed, covering units up to 125 pages per minute. A comprehensive range of reconditioned and remanufactured multi-functional devices is also available from the framework. Multifunctional devices, whether new or reconditioned/remanufactured are available in mono, colour or colour capable units.

Service and maintenance is typically delivered through a cost per copy click rate, which is inclusive of service and maintenance, staples and toner; standard service and maintenance providing a standard 4 hour response to fault and 2 hour fix, available 08:30 – 17:00, Monday to Friday, 52 weeks of the year. Enhanced and Basic service and maintenance options are also available from selected suppliers.

Devices are complemented by the supply of printers, print management and other document related software, and a range of support and consultancy services including general consultancy services, free of charge print audit services and project management services.

The framework also gives access to a range of associated Digital Transformation Solutions, which provide framework users with a range of business transformational solutions, maximising the latest hardware, software, services and solutions to deliver efficient and effective digital transformation solutions. This framework is designed so that framework users are able to select a preferred supplier with whom they can, should they so choose to do so and over a period of time, develop and transform their business operations incorporating an extensive and related suite of business supplies, services and solutions. The framework recognises the benefits in the identification and development of strategic relationships, providing a single lead supplier relationship for multiple solutions; delivering business efficiencies, effective solution supply and ease of contract and account management.

The range of associated digital transformation solutions includes the following:

- Audio Visual Supplies and Services
- Document Storage and Distribution Services
- Electronic Document Management Systems and Services
- External Print and Related Services
- Hybrid Mail
- Mail Management Services including Mail Room Services
- Scanning and Archiving Services

Seven suppliers have been awarded a place on this Lot and they are detailed below:

- Altodigital Networks Limited
- Apogee Corporation Limited
- Aurora Managed Services Limited
- Kyocera Document Solutions (UK) Limited
- Ricoh (UK) Limited
- Right Digital Solutions Limited
- Sharp Business Systems UK Plc

Framework users are able to contract for any one or a number of the Solution Category Areas under this Lot.

Access to the suppliers' product range and pricing is available via the framework Helpdesk – see Section 7 for details of the framework Helpdesk.

The solutions, supplies and services available under the framework can be priced in a variety of ways as detailed within each individual Solution Category Area specification. However, in summary, the key pricing mechanisms include the following, or a combination of the following:

- ✓ Lease (including service and support charges where relevant)
- ✓ Outright purchase (including service and support charges where relevant)
- ✓ Software as a Service
- ✓ Devices as a Service
- ✓ Solution as a Service
- ✓ Licence Fees
- ✓ Service Rates
- ✓ All-inclusive cost per copy page including the cost of all hardware, software, services, etc
- ✓ Packaged/Term Services

Through the availability of the associated digital transformation solutions, the framework is designed not only to deliver individual standalone solutions, supplies and services but also to provide an environment for business transformation over time, incorporating the development and expansion of individual solutions, supplies or services, and/or the adoption of further solutions/supplies and services within the scope of the framework.

It is recognised that the term of any contract let under this framework should be sufficient to address the breadth of service delivery options and expectations and the need for transformation over time. In this respect, framework users can benefit from leases with a variety of terms but most typically on a 3, 4 or 5-year basis. and wider solution contract terms, incorporating for example any one or more of the digital transformation solutions, of up to 10 years in length.

3 BUYING FROM THE FRAMEWORK

How do framework users buy from the framework? This can be done in one of two ways:

3.1 DIRECT AWARD

Direct Award is an option under the framework. Where Direct Award is undertaken, framework users must do so in keeping with the provisions of the Public Contract Regulations 2015. Direct Award can occur where only one supplier is capable of fulfilling the framework user's requirement in the manner in which the framework user requires it to be performed. It entails the framework user direct awarding business to a supplier without the supplier having to engage in a further competitive process to win the contract. Basic advice and guidance upon placing a direct award can be obtained from the Helpdesk (see Section 7.) but as a guide, the following provisions apply to Direct Award under the framework.

It is recognised that framework users may elect to adopt Direct Award on the basis of many individual factors but as a guide, the framework recognises the potential for Direct Award to be made on the basis of any one, or a combination, of the following Direct Award criteria:

- Solution/Supplies/Service Specification
- Continuity of supply – either in terms of brand/solution or supplier
- Cost of change - either in terms of brand/solution or supplier
- Price (with regards to supply Multifunctional Devices only)
- Delivery Timeframe/Date/Charges
- Warranty
- Maintenance
- Compliance to BS Standards or equivalent
- After Sales Service, i.e., Returns Timescales/charges

When considering a Direct Award, framework users may, in the first instance, contact the framework Helpdesk in order to understand supplier's capabilities/attributes in respect of any one or a combination of the three Tiers of Direct Award Criteria. Alternatively, the framework user may elect to contact each supplier directly to establish their capabilities in this regard. Thereafter the framework users would review, compare and contrast capabilities/attributes across each of the suppliers in order to inform a Direct Award decision.

Where, having compared their requirements against any one, or a combination of the objective Direct Award Quality Criteria, only one supplier meets their requirements, the framework user will have identified their chosen successful Suppliers and will be at liberty to Direct Award to that Supplier without engaging in a further competition process. Where the result of the framework user's review identifies more than one Supplier who meets their requirements, they will have the opportunity to review their requirements and once again begin the comparison.

Only where no areas of uniqueness are identified within any one or a combination of the objective Direct Award Criteria, will the framework user have to engage in a further competition, as detailed in Section 3.2 below, with all Suppliers who meet their requirements.

Framework users should note that limited Core List pricing is available in respect of multifunctional devices (which can be obtained from the framework Helpdesk) and this information, can be used as a criteria to justify a Direct Award.

3.2 FURTHER COMPETITION

Framework Users can engage suppliers in a further competition. When engaging in a further competition exercise, Framework users must invite all the framework supplier to participate in the further competition. Whereas all suppliers must be given the opportunity to engage in the further competition, they are not obliged to submit a quotation and may decide not to submit a bid under the further competition. This doesn't invalidate your further competition.

The following is an example of a traditional further competition process (for illustrative purpose only):



If conducting your own further competition exercise framework users should note the base evaluation criteria and weighting for the framework. The evaluation criteria and weighting utilised during the framework tender process is detailed within Appendix E.

A standard further competition template for use in a traditional further competition is attached in Appendix

B should framework users wish to utilise it to undertake their further competition exercise.

Further competitions may take place in either of the following situations:

- Framework users can elect to undertake a further competition in preference to awarding business via Direct Award, e.g. following the traditional process detailed above,
- Framework users can undertake a further competition process where, having followed the Direct Award process detailed above, no single Supplier has been identified as having the ability to deliver the Framework user's requirements.

The resulting further competition can be embarked upon in one of the following two ways:

- i) Framework users have the option to conduct a shortened further competition exercise by seeking quotations from successful Suppliers on the basis of Price only, thus retaining the Quality scores and weightings achieved by each successful Supplier through the framework invitation to tender process.

Having secured pricing proposals, these should be evaluated utilising the weighting for Price used in framework invitation to tender process and a price weighted score determined, which will then be added to the Quality scores achieved by each of the framework successful Suppliers at the framework invitation to tender stage, to determine the winning bid.

ii) Alternatively, framework users have the option to conduct a full further competition exercise, by evaluating Supplier's proposals in response to their requirements, utilising both quality and price factors (and an associated weighting scoring mechanism) in line with the Public Contract Regulations.

Basic advice and guidance upon conducting further competitions on either framework Lot, can again be obtained from the Helpdesk (see Section 7.).

4 FREE OF CHARGE PRINT AUDITS

Print audits are available free of charge* under the framework, from any supplier. Print audits can be requested directly from a particular supplier without the need to engage in any form of comparison/assessment process to select a supplier to conduct the print audit. However, framework users may find it beneficial to select a supplier to conduct the print audit following a structured comparison process. Framework users should note that information will need to be shared with the supplier conducting the print audit in order for the audit to be effective. Print audits can be a valuable way of understanding your current printing costs and the potential for print savings. Please be sure to speak with the appropriate supplier account manager for more details and to book an audit.

The results of the print audit should be used to inform your service specification. Framework Users should note that invariably print audit results and recommendations will be supplier centric and therefore great care should be taken to normalise the findings before communicating a specification through the Further Competition process.

Framework users should note that print audits can only be obtained free of charge where there is commitment to utilise the framework for the resulting provision of devices and services. Print Audits will be charged in full where framework users receive a free of charge print audit and elect upon receiving the results of the audit to utilise a different framework or route to market to fulfil their requirements for devices and services.

***A charge may be levied by some providers where the extent of the required audit is extensive and complex especially in relation to the provision of multi-site/multi-location audits and/or audits in respect of the associated digital transformation solutions.**

5 FURTHER COMPETITION SUPPORT SERVICE

In addition, the framework offers a comprehensive further competition procurement service. The service fees vary depending upon the potential scale of the requirement and full details can be found in Appendix C. The further competition support service provides either a light touch documentation review service prior to engaging in the further competition, or a full procurement support service to undertake a fully compliant further competition exercise. The full procurement support service includes:



Where relevant the service includes up to two visits to customer site (at the service provider's sole discretion); be that to determine requirements, assess supplier capability, undertake evaluations or present findings. All other activities will be undertaken through electronic communication.

The documentation review service is available to framework users engaging in further competitions. A Framework user's completed further competition documentation can be reviewed, critiqued and where appropriate amendments suggested, ensuring the documentation is fit for purpose and in keeping with spirit of the framework; thus enhancing the chances of a successful further competition. It is important to note that this service does not provide a documentation drafting service. Documentation drafting is an integral part of the full procurement support service detailed earlier this section.

Should you require further information about either of these services, or wish to benefit from the services, please contact the Strategic Contract Manager Steve Davies:

Email: steve.davies@mfdframework.co.uk

Tel: 07966040564

6 PLACING AN ORDER

Having selected your chosen supplier and solution, be it through further competition or direct award, framework users can utilise any one of the following order mechanisms to place their order. Please note, all order mechanisms are governed by the framework Call-Off Contract Terms and Condition regardless of the framework user's choice of order mechanism. Your preferred supplier will populate your choice of the following order options:

- The Framework Order Form

This form should be populated by completing the appropriate sections stated within the form, detailing the Framework user's solution requirement.

- The Framework Access Agreement

This form should be populated and additional schedules (in the form of a Statement of Works, Payment Schedule, Service Levels and other particulars) comprising the specifications and services being received by the framework user, added to this Agreement to constitute the contract documentation suite.

- Call-Off Contract Terms and Conditions incorporating appropriately populated Schedules

The terms and conditions should be populated where indicated within the Call-Off Contract Terms and Conditions document, including full details of the framework user's requirements within the contract Schedules.

These documents will be populated by the supplier with the full details of your requirement and then presented to you once completed for signature.

Once one of these documents is completed, please send them to the framework Helpdesk at the email address displayed in Section 7 below. Please note, all information will be kept confidential and will only be used for internal monitoring and management information purposes.

It is anticipated that most framework Orders will be placed via the Framework Order Form – and a copy is detailed in Appendix D, copies of the Access Agreement and or the Call-Off Contract Terms and Conditions can be obtained from either the framework Helpdesk or your chosen supplier.

7 CONTRACT AND ACCOUNT MANAGEMENT

Day-to-day contract management support is available from the framework Helpdesk. The Helpdesk is open from 09:00 to 17:00 Monday to Friday excluding Bank Holidays and can be contacted either by phone or email as follows:

Email: cbg@mfdhelpdesk.org

Tel: 0345 307 4057

The friendly Helpdesk staff will be on hand to answer your questions and assist you in any way they can. Specifically, they can:

Provide advice and guidance upon the operation of the framework



Help address any unresolved maintenance and service issues



Address any supplier specific questions



Provide basic advice and assistance in the drafting of specifications and undertaking further competitions



Provide general advice and guidance of a technical nature



Device fault calls should **not** be directed towards the Helpdesk. Device fault calls should be directed to the appropriate supplier device fault reporting service. Unresolved fault queries can be escalated through the Helpdesk if the framework user experiences persistent problems.

In addition to the Helpdesk, additional account management support is provided by the appropriate supplier Account Manager. Account Managers are detailed in Appendix A and they can be contacted with regards to any matter concerning the supply (including order, delivery and implementation) and operation of the devices/print service.

8 COMPLAINTS AND ESCALATION PROCEDURES

Day-to-day complaints should be raised in the first instance with your chosen supplier. Where appropriate they may also be raised/escalated to the Helpdesk Manager, Kath Johnson. All complaints raised with the Helpdesk will be recorded and the way forward agreed with the Member. In the vast majority of cases such complaints will be addressed to the satisfaction of the framework user within a reasonable period of time (such time will vary depending upon the nature of the complaint). However, in the unlikely event that a complaint is not resolved to the satisfaction of the customer within a reasonable time, complaints should be escalated as follows:



9 DELIVERY AND FAULT REPAIR

A comprehensive contract management regime underpins the operation of the framework. Suppliers' performance is continually monitored across all Members using the framework and issues addressed as they come to light. A framework user can expect the following standard service performance.



Framework users should also note that the above minimum requirements can be supplemented by additional local key performance indicators and other service delivery parameters agreed with their chosen supplier. Such local requirements must be mutually agreed with your chosen supplier.

The framework Strategic Contract Manager will undertake regular contract performance and management review meetings with all suppliers. Members are however encouraged to put in place their own local contract management regime to ensure performance of their chosen supplier. Framework users should ensure the framework Strategic Contract Manager is made aware of any issues of any persistent or unresolved nature so they can be addressed with the appropriate supplier at the appropriate supplier review meeting.

10 USER TRAINING

Comprehensive user training is provided free of charge at the point of device installation. The installing engineer will deliver hands on training to those users present at the point of installation. The engineer will similarly provide Super User training if required, thus allowing the receiving framework user to train other staff members themselves thereafter. Comprehensive user guides can be downloaded from suppliers' websites where required.

General advice and guidance can of course be obtained via the Helpdesk.

11 ANY QUESTIONS?

Should you have any questions about the operation of the framework that are not adequately covered by the User Guide, please do not hesitate to contact the Helpdesk.

Email: cbg@mfdhelpdesk.org

Tel: 0345 307 4057

12 APPENDIX A – SUPPLIER CONTACT DETAILS

Altodigital Networks Limited

Rich George-Higgins
07967 577076 rich.george-higgins@altodigital.com

Apogee Corporation Limited

Gary Day – Director of Public Sales
0207 078 7933
gary.day@apogeeCorp.com

Aurora Managed Services Limited

Richard Pole
Enterprise Sales Director
07754752087
rpole@aurora.co.uk

Kyocera Document Solutions (UK) Ltd

John Barron
07775 705669
john.barron@duk.kyocera.com

Ricoh UK Ltd

Keith Stevenson - General Framework Queries and Support:
07823553123
keith.stevenson@ricoh.co.uk

Requests for Quotation:
bid.team@ricoh.co.uk

Right Digital Solutions Limited

Ian Jones
07856 000339
ian.jones@rightdigitalsolutions.com

Sharp Business Systems UK Plc

David Harrison – National Accounts UK Director
0208 734 2027
07808 479138
david.harrison@sharp.eu

13 APPENDIX B – FURTHER COMPETITION TEMPLATE

AVAILABLE VIA THE FRAMEWORK WEBSITE:

www.mfdframework.co.uk

14 APPENDIX C – FURTHER COMPETITION SUPPORT SERVICE FEE STRUCTURE

Further Competition Support Services are available upon payment of the appropriate fees. The Further Competition Support Services are chargeable services available to any framework user.

Documentation Review Service

The fee for this service is £200 per further competition document set.

Full Procurement Support Service

The full procurement support service is available across all framework Lots. Prices for undertaking a multifunctional device further competition (excluding associated digital transformation solutions) are detailed below. Prices for undertaking further competitions that involve the provision of one or more of the associated digital transformation solutions can be obtained by contacting the framework Helpdesk – see Section 7. above for contact details.

The further competition support service for further competitions for multifunctional devices (excluding associated digital transformation solutions) has four tiers of service, each with different cost structures, each aligned to the size of a framework user's print device requirements.

Tier One*	<ul style="list-style-type: none">• Framework users where there is a requirement for 5, or less than 5 devices.• The fee for further competition support will be £750 per framework user for each further competition exercise.
Tier Two*	<ul style="list-style-type: none">• Framework users with a requirement for more than 5 devices but less than 15 devices.• The fee for further competition support will be £1500 per framework user for each further competition exercise
Tier Three*	<ul style="list-style-type: none">• Framework users with a requirement for more than 15 devices but less than 50 devices.• The fee for further competition support will be £2750 per framework user for each further competition exercise
Tier Four*	<ul style="list-style-type: none">• Framework users with a requirement for more than 50 devices.• The fee for further competition support will be £3750 per framework user for each further competition exercise

The fees will be exclusive of VAT and travel and subsistence.

Each will include full procurement support to undertake a further competition exercise; support to include:

- Assistance with the determination of customer requirements
- Receipt of bids
- Assistance with compilation of specification
- Undertaking of evaluations with, or on behalf of, the customer. Presenting findings and recommendation to the customer.
- Compilation of further competition documents and evaluation model
- Communicate results of further competition to bidder
- Dispatch of the above to framework suppliers

The service includes up to two visits to customer site (at the service provider’s sole discretion); be that to determine requirements, undertake evaluations or present findings. All other activities will be undertaken through electronic communication.

Further competition support services involving the provision of one or more of the associated digital transformation solutions are also available under the framework. However due to the breadth and potential complexity of the associated digital transformation solutions, it is not possible to provide universal fixed price further competition support services. Framework Users requiring further competition support services of this nature 2 should contact the Helpdesk for a quotation.

15 APPENDIX D – EXAMPLE FRAMEWORK ORDER FORM

ORDER FORM ("Statement of Works")

[] (the End User) wishes to procure the below mentioned Solution from [] (the Supplier), commencing on [] and ending on [] /continuing for a minimum period of [] months (*delete as applicable*)

unless varied in accordance with the Call-Off Contract Terms and Conditions.

The definitions that apply to the Agreement also apply to this Statement of Works.

This Statement of Works is issued under the Call-Off Contract Terms and Conditions ("Agreement"). Customers can use this Statement of Works to specify the Solution requirements they wish to order. The execution and return of this Statement of Works by the End User to the Supplier forms a Contract which is legally binding agreement between the parties. A copy of which (as appropriate) has been provided to the End User and is also available via www.charitiesbuyinggroup.com.

The Agreement applies to the exclusion of all other terms including, without limitation, any terms appearing on a purchase order of which the Supplier seeks to impose or incorporate, or which are implied by trade, customer, practice or course of dealings.

End User Site	
Address for Receipt of Solution	Invoice Address (if different)
Post Code	Post Code
Contact Name (PRINT) (Mr/Mrs/Miss/Ms/Dr/Rev):	
Tel No:	CBG Member No. (if known):
Email:	Fax No:
Delivery Date:	Installation Date (if different):
Signature (End User)	Date:
Name and Position (End User)	
Signature (Supplier)	Date:

The Solution being purchased is detailed [below/within the attached document entitled []]
 (delete as appropriate).

Solution		Price (ex VAT)	Price (inc VAT)
Supplies			
Software			
Documentation			
Services			
Maintenance			
Training			
Manufacturers' Warranties			

Reference Standard			
Bespoke terms and conditions which apply to this Statement of works only			
TOTAL PRICE		£ _____ excl VAT	

A completed copy of this form should be emailed to the Helpdesk at

cbg@mfdhelpdesk.org

Please note this information will be kept confidential and will only be used for internal framework monitoring and management purposes.

CONTRACT No CBG/DU/MFD/01

Contract for the Provision of Multifunctional Devices and Associated Digital Transformation Solutions



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16 APPENDIX E – FRAMEWORK WEIGHTING

The weighting used to select suppliers through the original framework Invitation to Tender process is detailed below. Weighting is provided for information purposes to assist framework in determining their further competition evaluation criteria and associated weighting. Framework Users are advised to select evaluation criteria and associated weighting that supports the spirit of the framework and can be clearly related back to the original published criteria. Certain criteria may be more or less relevant or indeed not relevant at all, to a Framework user’s further competition and therefore their evaluation approach may be subtly different to that adopted in the original Invitation to Tender but must remain in compliance with the public procurement regulations.

Price

40%

Quality

60%

Quality:

Question Number	Weighting %
Method Statement Strategic statement upon the delivery of the framework	3
Device Technical Specification Compliance with the device technical specifications	10
Remanufactured/Reconditioned Devices	3
Associated Digital Supplies, Services and Solutions e.g. Print Audit Services, Project Management Services and IT Support Services	7
Print Management Software e.g. Print management software and ability to customise	1
Other Related Print and Document Management Software	0.5
Print Audit Services	0.5
Project Management Services	1
Customer Support Services e.g. Helpdesk provision	1
Equipment Warranty and Quality e.g. warranty, quality assurance policies and certifications	1
Order Process e.g. electronic communication/ordering systems, cancellation policies	1.5

Delivery e.g. delivery timescales, delivery process, policies for dead-on-arrival or faulty devices, safe and secure delivery of supplies, movement/relocation of devices and business continuity	2.5
Security	1
Solution Availability	1
Training e.g. user and super user training provision	1
Maintenance Support Services e.g. nature of maintenance service, response and fix times, standard maintenance service provision plus basic and enhanced services	4
Training e.g. user and super user training provision	1
Account Management Structure e.g. Account management structure, management information, key performance indicators, complaints and escalation procedures	7
Marketing e.g. promotion of the Framework	3
Sustainability e.g. approach to sustainability, carbon reduction and low energy devices	1
Social Value	10
TOTAL	60%