NATIONAL EDUCATION
FRAMEWORK
USER GUIDE

Cashless Payment Solutions
REF: CPC/DU/CASH/02A

Contents

1   Introduction

The Crescent Purchasing Consortium Limited has put in place a compliant framework for Cashless Payment Solutions reference CPC/DU/CASH/02A (hereafter the framework). It is a proactive, best value, collaborative framework that can deliver your entire cashless payment system needs.

2   Framework Summary

The framework agreement is designed to be a one stop shop for an Member's entire cashless payment system needs and is let under a single lot.

Cashless payment solutions remove the need for handling of cash at the point of sale, improving the customer and user experience, reducing queues and speeding up service, creating value for money for the customer/user, whilst providing full reporting functionality, across a variety of solutions to meet users' diverse needs.

Cashless payment systems are used across a variety of sectors and for an ever expanding list of purposes. The categories of use can be summarised as follows: (but not limited to);

- Catering;
  - Cafeterias/Restaurants/Canteens/Refectories/Dining Rooms/Tuck Shop
  - Pre-order and pay for food online, input dietary and allergy requirements, etc.
  - Pay for food on-site using preloaded cards e.g. mifare cards

- Vending machines (food/drinks/other)

- Retail;
  - Bookshops, branded items, clothing, school uniforms, stationery, etc.

- Trips and Accommodation

- Tuition Fees

- Sports/Gym/Clubs & Societies Memberships, After School clubs

- Conference Centres & Event Management;
  - Accommodation, meals, event workshops, parking, etc.

- Libraries

- Personal Lockers

- Storage Lockers/areas

- Car parking, barrier/building/door entry systems

<u>Supplies and Services Provision</u>

This framework provides a comprehensive range of hardware, software, and professional services to address your needs.

- Hardware and Associated Equipment

  A comprehensive range of hardware and associated equipment is available to deliver an efficient and effective cashless payment system, including but not limited to card machines, point of sale terminals, self- service terminals, customer payment kiosks, scanners, receipt printers, bar code and label printers, biometric readers, cash drawers, vending interfaces, personal card printers, smart card readers, visitor management systems etc

- Cashless Payments System Software

  Cashless payments systems require appropriate software to facilitate the efficient and effective operation of the system. A number of software options are available from the framework suppliers.

- User Payments Methods

  Cashless payment systems also require access to a variety of user payment methods to facilitate the operation of a cashless environment. The framework provides access to such methods including, but not limited to, online facilities, phone payments, bespoke card payment and payment cards.

- Additional System Features

  Cashless payment systems may also require a range of additional features/functionality in order to facilitate an efficient and effective system. Such services include, but are not limited to, merchants accounts, email receipting, access to all major credit cards, token payment and table tracking.

- Service and Maintenance Support

  Service and maintenance support, is critical to the delivery of an effective and efficient cashless payment system and a variety of support options are available from the framework suppliers.

- Expert Technical Support – Professional Services

  The framework provides access to a range of professional support services to support the choice of systems, system installation and ongoing use of the systems. Such services include, but are not limited to, audit services, IT support services, project management services and customer support services.

There are four suppliers awarded a place on this framework and they are detailed below:

Suppliers

CIVICA	CIVICA
CRBCunninghams education solutions	CRB Cunninghams
MCR systems	MCR Systems
Pebble INCOME GENERATION SPECIALISTS	Pebble

3   Buying from the Framework

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

3.1   Direct Award

Direct Award takes place where a Member direct awards business to a supplier without the supplier having to engage in a further competitive process to win the contract.

Each supplier has an agreed price list for the supplies and services available under each Lot and these can be accessed by contacting the framework Help Desk. The price lists may be of assistance to Members when deciding whether or not to Direct Award to a supplier.

Where Direct Award is undertaken, Members must do so in keeping with the provisions of the Public Contract Regulations 2015 and Members attention is drawn to theses rules. Where a Member elects 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 objective Direct Award criteria:

- Solution/Supplies/Service Specification
- Delivery Timeframe/Date/Charges
- Warranty
- Maintenance
- After Sales Service, i.e. Returns Timescales/charges
- Price

Framework Users should ensure all order documentation quotes the framework name, reference number and a statement to the effect that the business is contracted under the terms and conditions of this framework. Failure to do this may result in Framework Users not accessing the excellent services and rates available under this framework.

This should be undertaken whether the selected supplier is your current supplier or not. Framework Users can elect to utilise the Optional Framework Order Form detailed within Appendix D if so desired. This can be emailed or posted to your chosen supplier. Appendix E details the framework Access Agreement. It is not mandatory that Framework Users sign this agreement in order to access the framework, however it is recognised that Framework Users may wish to do so.

3.2   Further Competition

A Member can engage suppliers in a further competition in pursuit of additional value on all framework Lots. When engaging in a further competition exercise, Members must invite all the suppliers, from within the respective Lot from which they are purchasing, to participate in the further competition. All suppliers within the respective lot must be given the opportunity to engage in a 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.

Basic advice and guidance upon conducting further competitions can be obtained from the Help Desk.

Email: holly.ashworth@dukefieldprocurement.co.uk
Tel: 07756205026

A standard further competition template for use in a traditional further competition is attached in Appendix B for Members wishing to undertake their own further competition exercise.

4 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:

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	✓		

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 Members engaging in further competitions. A Member'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@dukefieldprocurement.co.uk

Tel: 07966 040564

5   Placing an order

Having selected your chosen supplier and print solution, orders should be placed via the Framework Order Form – a copy is detailed in Appendix D. Your preferred supplier will populate the Order Form with the full details of your requirement and then present you with a completed Order Form for signature. The Order Form under which the contract will be enabled clearly references the framework terms and conditions. **In order to benefit from framework pricing please ensure the reference number CPC/DUCASH/02A is clearly quoted on all order forms and framework enquiries.**

Appendix E details the framework Access Agreement. It is not mandatory that Framework Users sign this agreement in order to access the framework, however it is recognised that Framework Users may wish to do so.

6   Contract and Account Management

Day to day contract management support is available from the framework Help Desk. The Help Desk 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:frank.gourley@dukefieldprocurement.co.uk

Tel: 07957883925

The friendly Help Desk 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 ✓	

In addition to the Help Desk, 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 and installation of your cashless solution.

7   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 Help Desk. All complaints raised with the Help Desk 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 Member 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:

STEP 1 — Should the Help Desk be unable to resolve your complaint, please contact the Framework Strategic Contract Manager Steve Davies via email: **Steve.davies@dukefieldprocurement.co.uk**, or M: **07966040564**. In the unlikely event that he is unable to resolve the complaint to your satisfaction, then please escalate to Step 2.

STEP 2 — Escalation to the Director, Jon Chamberlain. Jon can be contacted by email at **Jon.chamberlain@dukefield.co.uk**, or by T: **01204 374170** or M: **07957888274**

8   Delivery and Complaint Resolution

Framework Users are encouraged to put in place their own local contract management regime to ensure acceptable performance of their chosen supplier. The local regime could include Key Performance Indicators (KPIs) specific to contract performance, such as billing conditions, statistics and reports and contract review meetings.

All local requirements must be mutually agreed with your chosen supplier. The framework support team can provide support and advice in determining SLAs and KPIs appropriate to your specific requirements.

In addition to the arrangements specific to each contract, a comprehensive contract management regime underpins the operation of the framework itself. Suppliers' performance across all contracts let through the framework is continually monitored across all user Members and issues addressed as they come to light. The framework Contract Manager will undertake regular contract performance and management review meetings with all suppliers as part of this performance monitoring process.

Framework Users should therefore ensure that 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. 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 Member can expect the following standard service performance on

Hardware KPIs

Delivery to contract timescales

• Products delivered within 30 working days 98%

Service Engineer Attendance

• 98% of maintenance call responded to within 6 hrs

Time to Fix

• 97% of equipment fixed within 8 hours of fault report

First Time Fix Rate

• 95% first time fix

Software and Hardware Availability

- 98% service uptime

Number of Fault Calls Per Device

- Maximum number of 4 fault calls per device per quarterly review period. Please note equipment with fault calls in excess of this target for two quarterly review periods will qualify for an automatic device swap out of the said device with an equivalent model with equivalent functionality, regardless of the age of the faulty device.

Software KPIs

Diagnosis of faults

- 98% close of business working day following fault report

Time to Fix

- 97% within two business days of fault report

Software Availability

- 99% software uptime/availability close of business working day following fault report

Members 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 local regime could include Key Performance Indicators (KPIs) specific to contract performance, such as billing conditions, statistics and reports and contract review meetings.

All local requirements must be mutually agreed with your chosen supplier. The framework support team can provide support and advice in determining SLAs and KPIs appropriate to your specific requirements

The framework Contract Manager Holly Ashworth 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. Members should ensure the framework 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.

9 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 Help Desk.

Email:
frank.gourley@dukefieldprocurement.co.uk

Tel: 07957883925

10 APPENDIX A – Supplier Contact Details

CIVICA
Thoraya El-khawad
Bid Manager
079742 16806
Thoraya.el-khawad@civica.co.uk

CRB Cunninghams
Gareth Hunter
Corporate Account Manager
07734333253
Gareth.hunter@Crbcunninghams.co.uk

MCR Systems
Paul Jewell
Head of Sales Business
07741 323414
pjewell@mcr-systems.co.uk

Pebble
Ryan Green
CEO
0845 310 1788
ryan.green@mypebble.co.uk

APPENDIX B - FURTHER COMPETITION TEMPLATE

[INSERT NAME OF MEMBER]

INVITATION TO SUBMIT A PROPOSAL

FOR

[INSERT TITLE]

Closing Date: *[date/time]*

Contact: *[insert contact details of person undertaking further competition]*

1. INTRODUCTION

1.1 (*Insert details of the Member and a summary of the project and its aims and objectives. Also consider inserting a timetable detailing the key delivery dates within the further competition.*)

2. INSTRUCTIONS TO TENDERERS

2.1 **COMPLETED PROPOSALS SHOULD BE SUBMITTED TO:-**

[*Insert contact details for return of further competition submissions*]

Suppliers should ensure that they allow enough time to submit their questionnaire response. **The Member will accept no responsibility for difficulties during the process of submission and/or late or lost submissions.**

2.2 The deadline for the return of quotations is 12 noon on xx xxxxxx 2021.

LATE SUBMISSIONS WILL NOT BE ACCEPTED.

2.3 Please study the documentation carefully. If you are in any doubt as to any technical aspects of the specification/project brief, or require clarification of any part of the document please contact [*insert project officer contact details*]

2.4 Suppliers are required to submit competitive prices strictly in accordance with the attached specification/project brief.

2.5 Suppliers must fully complete all parts of this document using the same question numbering format as used in this document and sign the declaration. Failure to provide a completed quotation in the required format may result in the quotation not being considered.

2.6 Freedom of Information - In accordance with **Freedom of Information Act 2000**, from January 2005, Members must respond within 20 working days to valid written requests for information from anyone. The information requested must be supplied unless it falls into specified categories of information which include: confidential, personal, trade secret, or information which would or would be likely to prejudice the Supplier's or the Member's commercial interests. These categories are exemptions under which information may not be disclosed.

2.7 It will be the Supplier's responsibility to clearly state in their Proposal submission any information which they regard as confidential, personal information, trade secret or may prejudice their commercial interests and to discuss this with the Member prior to submission.

2.8   Suppliers are advised that information which falls into our agreed interpretation of the legal definition of confidentiality, personal information, trade secret or prejudice to their commercial interests may still have to be disclosed in some circumstances. You should be aware that the Member may be forced to make information public as a result of an appeal by a member of the public against our initial decision not to reveal information. The public can appeal through our internal complaints procedure and ultimately to The Information Commissioner's Office, the Government Member responsible for enforcing the Act.

2.9   You will also need to provide with your quotation submission a contact within your Member to ensure that should we need to consult on a Freedom of Information request we can do this promptly. If we are unable to contact anyone to consult we may have to release the information to ensure that we remain within the 20 working days deadline.

3.   EVALUATION

3.1   Proposals received will initially be reviewed on the basis of compliance with the threshold requirements. For the avoidance of doubt, all threshold requirements must be achieved in order for your bid to be further considered.

A listing of the relevant threshold requirements are detailed in Appendix 3.

(Delete references to Threshold Questions if no Threshold Questions are being asked)

3.2   The bids from those Suppliers who meet the defined thresholds will be fully evaluated at Phase 2 of the Evaluation Process. The evaluation will be on the basis of most economically advantageous tender as follows:

Price xx% Quality xx%

[Insert quality evaluation criteria]

3.3   Please note there are a number of Threshold Questions within the document. Each Threshold Question is indicated by a '**(Threshold Question)**'. All Threshold Questions must be met in order for a tenderer's bid to be fully considered. **For the avoidance of doubt, failure to meet a Threshold will result in a tenderer's bid being rejected.**

 [*Delete the paragraph above if no Threshold Questions are being asked*]

3.4   Quality responses will be scored using the scoring mechanism detailed below.

0 = Unacceptable, No response, or unacceptable information provided

1= Poor, Inadequate details to show an understanding of the requirements

2 = Satisfactory, Satisfactory details to show an understanding of the requirements

3 = Good, Adequate details provided to show an understanding of the requirements

4 = Very Good, Substantial details provided to show an understanding of the requirements

5 = Excellent, Comprehensive details provided to show an understanding of the requirements

Tenderers scoring a 5 will receive the entire weighting mark for each question. Those scoring a 4 will receive 4/5ths of the weighting mark and so on.

3.5   Price Evaluation

Price will account for xx% of the overall score. Tenderers must submit prices for each of the requirements detailed within the Pricing Schedule (Appendix 2).

Tenderers should complete the Pricing Schedule (Appendix 2) with details of their proposed costs. The Tenderer submitting the lowest proposed cost will receive the full xx% price weighting. All other tenderers will receive a proportion of the xx% dependent upon the relative position of their price to the lowest priced bid. For example, where a Tenderer submits a proposed cost that is 10% more expensive than the lowest price bid, they will receive 10% less weighting than the lowest price, i.e. xx% of the total xx% weighting.

3.6   The Member may request bid presentations as part of the bid clarification process to enable the Member to better understand a Suppliers' bid. Where such clarifications are required Suppliers will be notified and invited to attend at an agreed date and time. Please Note – it may not be necessary to invite any or all bidders if no clarifications are required.

3.7   The Member will endeavour to reach a decision by *[insert date].* However, the Member is not bound to accept any quote submitted.

3.8   Resulting contracts will be subject to the terms and conditions of contract for the National Education Framework agreement – CPC/DU/CASH/02 A Contract for the provision of Cashless Payment Solutions.

Please note these Terms and Conditions are already contracted and are non-negotiable

4.   SPECIFICATION

4.1   The Members require a range of cashless payment solutions as detailed in Appendix 1. It should be noted that the specification detailed in Appendix 1 is representative of the Members' requirements and this may be changed following award of contract.

5.   PRICE SCHEDULE

5.1   [*Insert the pricing methodology including*]

5.2   Suppliers are required to complete the Pricing Schedule (Appendix 2)

5.3   The pricing will be held for the duration of the contract/ agreement.

6.   SITE VISIT

6.1   *(Insert details of a supplier site visit if one is being offered to suppliers during the further competition process)*

6. DECLARATION

I/We hereby offer to provide the services as specified in xxxxxxxxxxxx in accordance with the Conditions of Contract governing the CPC/DU/CASH/02A Contract for the provision of Cashless Payment Solutions.

Signed   ………………………………………………………………………………

Name (Block Capitals)   ………………………………………………………………………………….

Designation   ………………………………………………………………………………

For and on behalf of   ………………………………………………………………………….

…………………………………………………………………… Tel. …………………………………………

Fax………………………………………………

E-mail address ………………………………………………………………………………….

APPENDIX 1 - SPECIFICATION

[Insert the specification in Appendix 1. The following issues are examples that may wish to be considered within the specification. The list is not exhaustive and is only series of examples

Technical Requirements

Delivery of Consumables

Training
Should training be provided at point of installation or at a later point? May not be necessary for standard products.

Delivery Requirement
Consider delivery requirements including locations and timescales.

Sustainability
Consider sustainability requirements.

Account Administration
Consider account administration requirements, including invoices.

Account/Contract Management

Consider the nature of your account/contract management regime. For example, will you require:
- *regular quarterly supplier review meetings*
- *a designated account manager*
- *management information – including the regularity of such information?*

Project Management

Implementation Schedule

APPENDIX 2 – PRICING SCHEDULE

(Insert the pricing schedule here)

APPENDIX 3 – THRESHOLD REQUIREMENTS

(Insert any threshold requirements here)

APPENDIX 4 – SUPPLIER RESPONSE SCHEDULE

(Insert questions to be asked of the suppliers in respect of the Specification)

12 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 Member.

1. Documentation Review Service
   The fee for this service is £200 per further competition document set.

2. Full Procurement Support Service

The full procurement support service is available across all framework Lots.

Prices for undertaking a further competition under all Lots are available from email: steve.davies@dukefieldprocurement.co.uk or phone: 07966040564. 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.

13 APPENDIX D – Example Framework Order Form

NATIONAL EDUCATION CASHLESS PAYMENT SOLUTIONS FRAMEWORK

PURCHASE ORDER FORM

CONTRACT No CPC/DU/CASH/02A

Tel: 07957883925

[   ] wishes to order the below mentioned supplies and/or services.

This Purchase Order is for the supplies and/or services detailed below in accordance with the Terms & Conditions of the above framework as agreed between _____(the suppliers) and _____ (the framework user)

CPC Member No. _____

Item Code	Description	Sum
(Framework Users should append additional sheets detailing services being procured where relevant		
*Total Purchase Price £ _____ excl VAT		
Name of Establishment (The Customer)		
Invoice Address	Site Address (if different)	
Post Code	Post Code	
Contact Name (PRINT) (Mr/Mrs/Miss/Ms)		
Tel No	Email:	

Name (Print)	Position
Signature (Customer)	Date:

14 APPENDIX E – Optional Access Agreement

Access Agreement for Utilisation of the Education Cashless Payment Solutions Framework

This is a confirmation of access to the **National Education Cashless Payment Solutions Framework**

and an agreement of commitment to use said Framework.

Find a Tender Contract Notice Reference Number: 2022/S 000-003271	Contract Number: CPC/DU/CASH/02A
Framework User Contact: **Name:** **Email:** **Tel:**	**Supplier Contact:** **Name:** **Email:** **Tel:**

Framework Start Date **16th May 2022,**
Length of Framework Agreement: 3 years with the option of a 1 year extension.

This is an agreement to confirm "**[enter Framework User name]**" has satisfied itself of its eligibility to join the Framework as a **compliant body** nominated in the above referenced Find a Tender notice. Signature of this form constitutes acceptance of the Framework Agreement Terms and Conditions which are enclosed, thereby creating a binding commitment to the utilisation of a Call-Off Contract from the framework agreement referenced above.

We agree to enter into a Call-Off Contract as from "**enter date of commence**"

On behalf of the supplier: [enter supplier name]

Contact Name:	
Telephone number:	
Email Address:	
Signature:	
Date:	

On behalf of [enter Framework User name]

Contact Name:	
CPC Member No.	
Telephone number:	
Email Address:	
Signature:	
Date:	

15 APPENDIX F – FRAMEWORK WEIGHTING

Quality Criteria	Weighting %
Method Statements Strategic statement upon the delivery of the framework	3
Technical Specification Compliance with the technical specifications, hardware, consumables and additional supplies provision, software, user payment methods, compatibility and integration, additional system features and software	20
Service and Maintenance nature of maintenance service, service centers, response times, fault reporting, fix times, availability of parts and standard maintenance service	2
Expert Technical Support Professional support services, project management services, IT support services, audit services and customer support services	4
Security e.g. security standards or equivalents, PTS approved equipment with PIN transaction security or equivalents and where appropriate BPSS clearances or equivalents.	3
Order Process e.g. electronic communication/ordering systems, cancellation policies	3
Delivery, Installation and Commissioning e.g. delivery timescales, delivery process, policies for faulty devices or dead on arrival, safe and secure delivery of supplies test and loan devices and business continuity	7
Training e.g. user and super user training provision	2
Account Management e.g. Account management structure, management information, key performance indicators, complaints and escalation procedures	6
Marketing e.g. promotion of the Framework	2
Sustainability e.g. approach to sustainability, carbon reduction and low energy devices	4
Social Impact e.g additional value and benefits achieved for the local community	4
Total	**60.0%**