

RM6309
Management Consultancy Framework
Four (MCF4)

Framework Schedule 1
(Specification)

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1. Introduction

- 1.1. This Schedule sets out what we and our Buyers want.
- 1.2. The Supplier must only provide the Deliverables for the Lot that they have been appointed to.
- 1.3. For all Lots and/or Deliverables, the Supplier must help Buyers comply with any specific applicable Standards of the Buyer.
- 1.4. The Deliverables and any Standards set out below may be refined (to the extent permitted and set out in the Order Form) by a Buyer during a Further Competition Procedure to reflect its Deliverables Requirements for entering a particular Call-Off Contract.

2. The lots

- 2.1. The Services are divided into ten Lots:
 - Lot 1: Business
 - Lot 2: Strategy and policy
 - Lot 3: Complex and transformation
 - Lot 4: Finance
 - Lot 5: HR
 - Lot 6: Procurement and supply chain
 - Lot 7: Health, social care and local community
 - Lot 8: Infrastructure
 - Lot 9: Environmental and sustainability
 - Lot 10: Restructuring and insolvency
- 2.2. The Services within each Lot are contained in paragraphs 5 to 14 of this Specification and are not an exhaustive list. Buyers may require other similar Services, which will be detailed in the documents published by the Buyer when they undertake the Call-Off Procedure. The Buyer will not be restricted to seeking advice on specific Services listed under each Lot providing that the advice they are seeking is relevant to the broad heading of the Lot and the contract notice published on Find a Tender Service.
- 2.3. The Buyer's requirements will determine the Lot most appropriate to deliver the business need.
- 2.4. Performance Indicators (PIs) relating to Supplier performance under the Framework Contract are detailed in Framework Schedule 4 (Framework Management).
- 2.5. Service Levels relating to Supplier performance under the Call-Off Contract are stipulated by the Buyer in Call-Off Schedule 14 (Service Levels).

3. Mandatory service requirements: all Lots

- 3.1. This section of the Specification outlines the general scope of requirements for all Lots of the Framework Contract.

- 3.2. The Supplier must be able to offer advice, implementation and delivery of the services lines for each lot.
- 3.3. The Supplier shall meet the mandatory requirements listed below in paragraphs 3.4 to 3.33, under this Framework Schedule 1 (Specification).
- 3.4. The Buyer will confirm their required Services during the Call-Off Procedure.
- 3.5. The Call-Off Contract entered into by a Buyer will be managed by the Buyer. CCS may also call-off from this Framework Contract as a Buyer.
- 3.6. The Supplier shall create a generic email address which shall be used for all Buyers' queries.
- 3.7. For each Call-Off Contract, the Supplier shall be expected to provide advice and assurance on different delivery options, if applicable, to the Buyer with a clear assessment of each option. This may include but not be limited to, the practicality, timescales, cost, comparative value for money and risk. This advice and assurance may involve producing reports, outlining strategies, identifying programmes of work and associated project plans.
- 3.8. The Supplier shall ensure that knowledge acquired during the Call-Off Contract term is transferred to the Buyer, which allows for the Buyer to improve awareness of strategic approaches and market intelligence and to share the learnings to internal and external stakeholders in the future.
- 3.9. The Supplier shall provide to the Buyer a full project plan which includes outputs and milestones. The Supplier shall agree with the Buyer the frequency of updates on milestone delivery, risks, issues and any other metrics required by the Buyer.
- 3.10. The Supplier shall have processes and systems in place for ensuring costs and pricing are managed appropriately. This shall include ensuring the grade mix of the team assigned will be adapted to provide the right balance in terms of quality and cost effectiveness.
- 3.11. The Supplier shall consult the Buyer as to how they will manage and communicate with the stakeholders.
- 3.12. The Supplier shall ensure that all Services meet all of the policies and procedures detailed by the Buyer.
- 3.13. Security Clearance (SC) and/or Developed Vetting (DV) may be required of the Supplier staff for some Call-Off Contracts. If this is required the Buyer will detail their requirements in the Call-Off Procedure.

- 3.14. All Suppliers will need to have a current and valid Cyber Essentials certificate. If a Buyer requires Cyber Essentials Plus accreditation, this will be confirmed in the Call-Off Procedure.
- 3.15. The Supplier shall work with the Buyer and its stakeholders (if applicable) to identify and rank the risks identified and agree a risk management strategy. The Supplier shall proactively manage project risks and value management, to deliver mutual benefits and the most successful outcome for the Buyer.
- 3.16. The Supplier shall cooperate with all appropriate parties at all times in accordance with the spirit and terms of the Framework Contract and Call-Off Contract.
- 3.17. The Supplier may wish to consider the use of robotic process automation or artificial intelligence for elements of the delivery of Services on a case by case basis to the Buyer, where it is proven to bring additional benefits.
- 3.18. The Supplier shall be responsible for keeping their contact details updated during the Framework Contract Period. If changes are required the Supplier must email info@crowcommercial.gov.uk including 'RM6309 contact detail update' in the email subject line.
- 3.19. The Supplier shall be responsible for keeping under review the content of any information which appears on the Supplier's website and which relates to this Framework Contract and ensuring that such information is kept up to date at all times.
- 3.20. If a Supplier does not bid in a further competition the Supplier shall state the reason(s) why to the Buyer.
- 3.21. The Supplier shall perform all Services under this Framework Contract and any Call-Off Contract to a professional standard using reasonable skill and care and in accordance with Good Industry Practice.
- 3.22. Where a Supplier uses a Subcontractor they must report this in the Management Information template to CCS. The Supplier must identify any Subcontractor that is a SME and confirm the spend with that Subcontractor.

Complaints procedure

- 3.23. The Supplier shall have a robust and auditable complaints procedure for logging, investigating, managing, escalating and resolving complaints initiated by the Authority.
- 3.24. The complaints procedure shall comply with the following:
 - 3.24.1. All complaints shall be logged and acknowledged within twenty-four (24) hours of receipt by the Supplier;
 - 3.24.2. All complaints shall be resolved within ten (10) working days of the original complaint being made, unless otherwise agreed with the Buyer; and

- 3.24.3. All complaints shall be recorded, including: the date the complaint was received, complainant contact details, nature of the complaint, and the actions and timescales taken to resolve the complaint.
- 3.25. CCS may request a consolidated complaints report as and when from the Supplier, relating to all Buyer complaints. The report shall be provided to CCS by the Supplier within ten working days from the request.

Social Value

- 3.26. This Framework Contract requires the Supplier to embed social value into all Call-Off Contracts, in line with the Social Value Act 2012 or subsequent government initiatives to enable the effective implementation of the Act.
- 3.27. As a condition of participating on this Framework Contract, CCS requires Suppliers on this Framework Contract to demonstrate they are committed to report on the impact of social value throughout the lifetime of the Framework Contract to CCS, every 12 months from the Framework Start Date.
- 3.28. Suppliers must provide evidence of their commitment to social value and demonstrate an ability and willingness to work with Buyers to identify and help further their social value requirements in all Call-Off Contracts. To satisfy this requirement, Suppliers must agree to provide or deliver reasonable and proportionate social value benefits within all Call-off Contracts. Suppliers should consider the following policy themes, as a minimum:
 - 3.28.1. covid-19 recovery
 - 3.28.2. tackling economic inequality
 - 3.28.3. fighting climate change
 - 3.28.4. equal opportunity and
 - 3.28.5. wellbeing
- 3.29. Suppliers are expected to act with these priorities in mind, and CCS may discuss these priorities as part of Framework Management meetings.
- 3.30. Where applicable the Supplier shall work with its Key Sub-Contractors to ensure that social value is embedded within the supply chain and that there is a mechanism for Key Sub-Contractors to report on their social value activities to the Supplier.
- 3.31. The Buyer's requirements will be set out in the Call-Off Procedure. The Supplier shall comply with and/or identify proposed social value initiatives, proportionate and relevant to each Call-Off Contract.
- 3.32. The Supplier shall deliver measurable benefits and impacts in respect of the social value priorities, when identified in the Call-Off Contract.
- 3.33. The Supplier shall record and report performance against the social

value requirements, when detailed in the Call-Off Contract.

4. Rate cards

- 4.1. The Supplier cannot exceed Framework Prices. This includes where the Supplier utilises Key Subcontractors or Subcontractors.
- 4.2. No overtime or extra hours worked above the Working Day shall be paid by the Buyer to the Supplier regardless of the hours worked in a Working Day.

Lots 1 to 9

- 4.3. There will be 2 rate cards for Lots 1 to 9. These are advice and delivery.
- 4.4. The advice rate card will apply to advisory services provided under the Call-Off Contract. The advice rate card will not be applicable to implementation and delivery.
- 4.5. The delivery rate card will apply to the delivery and implementation elements of the Services. The delivery rate card will not be applicable to advice.
- 4.6. Where there is a requirement from a Customer which requires advice, implementation and delivery then both the advice and delivery rate card will apply.
- 4.7. The customer will confirm in their Call-Off Procedure which services apply (advice and/or delivery) and which rate card(s) will apply.

Lot 10

- 4.8. There will be 2 rate cards for Lot 10. These are complex and non-complex.
- 4.9. The non-complex rate card will be the starting point for all Call-Off Contracts for all primary capabilities (14.2.1-14.2.7) and additional capabilities (14.3.1-14.3.6). However, the Customer, in its sole discretion, may elect to offer a Call-Off Contract under the Complex rate card where the complexity of the work dictates as set out in 4.10.
- 4.10. Where at least three of the seven criteria set out in 4.10.1 - 4.10.7 are met for a Call-Off Contract, the complex rate card applies:
 - 4.10.1. company listed on any major stock exchange
 - 4.10.2. employees in excess of 500
 - 4.10.3. interests in foreign jurisdictions

- 4.10.4. lending in excess of £100m
- 4.10.5. multi-layered debt structures with multiple financial stakeholders
- 4.10.6. national security implications
- 4.10.7. operationally complex

5. Lot 1: Business

- 5.1. Provision of consultancy and professional services relating to the strategy, structure, management or operations of an organisation. This may include identification of options with recommendations as well as implementation and delivery.
- 5.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 5.3. The service lines are listed below in 5.4.1 - 5.4.14 and are not an exhaustive list. Buyers may require other similar Services, which will be detailed in the Call-Off Procedure.
- 5.4. The Supplier shall be able to offer a **minimum of seven** service lines in clauses 5.4.1 - 5.4.14 to the required Standards:
 - 5.4.1. Automation
 - 5.4.2. Business case development
 - 5.4.3. Business consultancy
 - 5.4.4. Business policy development and/or appraisal
 - 5.4.5. Business processes
 - 5.4.6. Business strategy
 - 5.4.7. Change management
 - 5.4.8. Digital, technology and cyber
 - 5.4.9. Innovation, growth and business models
 - 5.4.10. Operational planning and/or improvement, including target operating models
 - 5.4.11. Organisational design and review (enterprise resource planning)
 - 5.4.12. Programme and project management
 - 5.4.13. Risk, opportunity and compliance
 - 5.4.14. Value for money reviews

6. Lot 2: Strategy and policy

- 6.1. Provision of consultancy and professional services relating to corporate strategies or government policy. This may include identification of options with recommendations as well as implementation and delivery.
- 6.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 6.3. The Supplier shall be able to offer **all** service lines in clause 6.3.1 - 6.3.12 to the required Standards:

- 6.3.1. Business case development
- 6.3.2. Business process re-engineering
- 6.3.3. Business structure
- 6.3.4. Change management
- 6.3.5. Digital, technology and cyber
- 6.3.6. Future planning
- 6.3.7. Game plan
- 6.3.8. Policy
- 6.3.9. Regulatory advice
- 6.3.10. Social value
- 6.3.11. Strategy
- 6.3.12. Strategic advice

7. Lot 3: Complex and transformation

- 7.1. Provision of consultancy and professional services relating to complex programmes or portfolios of work which may be multi-disciplinary and/or transformational. This may include identification of options with recommendations as well as implementation and delivery.
- 7.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 7.3. The Supplier shall offer **all** of the service lines in clause 7.3.1 - 7.3.14 to the required Standards:
 - 7.3.1. Business
 - 7.3.2. Change management
 - 7.3.3. Complex programmes
 - 7.3.4. Delivery partner
 - 7.3.5. Digital, technology and cyber
 - 7.3.6. Finance
 - 7.3.7. HR
 - 7.3.8. Organisation design including target operating model
 - 7.3.9. Performance transformation
 - 7.3.10. Procurement and/or supply chain
 - 7.3.11. Programme and project management
 - 7.3.12. Strategy and/or policy
 - 7.3.13. Supplier side services and delivery
 - 7.3.14. Transformation management

8. Lot 4: Finance

- 8.1. Provision of strategic and operational consultancy and professional services relating to finance. This may include identification of options with recommendations as well as implementation and delivery.
- 8.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 8.3. The Supplier shall be able to offer a **minimum of eight** service lines in clause 8.3.1 - 8.3.20 to the required Standards:

- 8.3.1. Asset finance
- 8.3.2. Asset management including valuation, sales and disposals
- 8.3.3. Business analysis
- 8.3.4. Capital fundraising, derivatives and hedging
- 8.3.5. Cash management
- 8.3.6. Cost benefit reviews, studies, analysis and evaluation
- 8.3.7. Developing and assessing project proposals
- 8.3.8. Economic analysis
- 8.3.9. Financial accounting and/or reporting
- 8.3.10. Financial due diligence
- 8.3.11. Financial performance review and viability studies
- 8.3.12. Financing public projects and negotiations
- 8.3.13. Forecasting and budgeting
- 8.3.14. Investment, financial advice and market services
- 8.3.15. Mergers, acquisitions and divestment
- 8.3.16. Payment structure advice and risk
- 8.3.17. Pensions
- 8.3.18. Regulation and statutory requirements
- 8.3.19. Risk management
- 8.3.20. Tax including value added tax (VAT)

9. Lot 5: HR

- 9.1. Provision of consultancy and professional services relating to HR. This may include identification of options with recommendations as well as implementation and delivery.
- 9.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 9.3. The Supplier shall be able to offer a **minimum of four** service lines in clause 9.3.1 - 9.3.9 to the required Standards:
 - 9.3.1. Capability development
 - 9.3.2. Cultural transformation
 - 9.3.3. Equality, diversity and inclusion
 - 9.3.4. HR functions, process and design
 - 9.3.5. HR policy and strategy
 - 9.3.6. Organisational design and/or workforce planning
 - 9.3.7. People and performance
 - 9.3.8. Recruitment, retention and employee value proposition
 - 9.3.9. Training and development

10. Lot 6: Procurement and supply chain

- 10.1. Provision of consultancy and professional services relating to procurement and supply chain. This may include identification of options with recommendations as well as implementation and delivery.
- 10.2. Suppliers may use artificial intelligence (AI), quantum technologies,

digital tools and techniques in the delivery of the Services.

10.3. The Supplier shall offer a **minimum of eight** service lines in clause 10.3.1 - 10.3.12 to the required Standards:

- 10.3.1. Category management
- 10.3.2. Commercial review and benchmarking
- 10.3.3. Contract and/or supplier management
- 10.3.4. Cost reduction
- 10.3.5. Financial advice
- 10.3.6. Game theory
- 10.3.7. Operations, supply chain and logistics
- 10.3.8. Outsourcing and insourcing
- 10.3.9. Procurement process including P2P
- 10.3.10. Procurement regulation
- 10.3.11. Sourcing
- 10.3.12. Tender development and analysis

11. Lot 7: Health, social care and community

11.1. Provision of specialist consultancy and professional services relating to health, social care and/or community. This may include identification of options with recommendations as well as implementation and delivery.

11.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.

11.3. The Supplier shall offer a **minimum of five** service lines in clause 11.3.1 - 11.3.20 to the required Standards:

- 11.3.1. Alternative delivery models
- 11.3.2. Business case development
- 11.3.3. Capability development
- 11.3.4. Community services
- 11.3.5. Digital, technology and cyber
- 11.3.6. Emergency services
- 11.3.7. Healthcare operational review, improvement and/or modelling
- 11.3.8. Healthcare transformation, change and delivery
- 11.3.9. Housing
- 11.3.10. Mental healthcare
- 11.3.11. Not for profit
- 11.3.12. Planning for health, social care and community
- 11.3.13. Programme and project management
- 11.3.14. Public service improvement review
- 11.3.15. Regeneration
- 11.3.16. Security and welfare
- 11.3.17. Social care and safeguarding
- 11.3.18. Social mobility and levelling up

- 11.3.19. Sport, leisure and culture
- 11.3.20. Strategy and or policy

12. Lot 8: Infrastructure

- 12.1. Provision of specialist consultancy and professional services relating to infrastructure. This may include identification of options with recommendations as well as implementation and delivery (excluding construction).
- 12.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 12.3. The Supplier shall offer a **minimum of four** service lines in clause 12.2.1 - 12.2.13 to the required Standards:
 - 12.3.1. Aerospace
 - 12.3.2. Automotive
 - 12.3.3. Aviation
 - 12.3.4. Communications and technology infrastructure
 - 12.3.5. Defence
 - 12.3.6. Highways
 - 12.3.7. Nuclear
 - 12.3.8. Ports and shipping
 - 12.3.9. Public transport
 - 12.3.10. Rail
 - 12.3.11. Smart infrastructure
 - 12.3.12. Towns, cities and rural areas
 - 12.3.13. Travel, transportation and logistics

13. Lot 9: Environment and sustainability

- 13.1. Provision of consultancy and professional services relating to environment and/or sustainability. This may include identification of options with recommendations as well as implementation and delivery (excluding construction).
- 13.2. Suppliers may use artificial intelligence (AI), quantum technologies, digital tools and techniques in the delivery of the Services.
- 13.3. The Supplier shall offer a **minimum of four** service lines in clause 13.3.1 - 13.3.18 to the required Standards:
 - 13.3.1. Air quality
 - 13.3.2. Carbon net zero and/or carbon management (including reporting)
 - 13.3.3. Climate change adaptation and/or mitigation
 - 13.3.4. Coastal
 - 13.3.5. Contaminated land and water
 - 13.3.6. Due diligence
 - 13.3.7. Environmental planning and protection
 - 13.3.8. Environmental, social and governance (ESG)
 - 13.3.9. Feasibility studies and/or impact assessment

- 13.3.10. Life sciences
- 13.3.11. Monitoring environmental indicators
- 13.3.12. Natural capital
- 13.3.13. Natural resource management
- 13.3.14. Policy development and/or implementation
- 13.3.15. Pollution control (including noise)
- 13.3.16. Regulatory compliance
- 13.3.17. Sustainability
- 13.3.18. Waste management

14. Lot 10: Insolvency and restructuring services

- 14.1. Provision of objective advice in relation to corporate restructuring and insolvency. Although the exact nature of this advice will vary by case, Suppliers must be able to demonstrate the required expertise in relation to distressed corporate situations.

Primary capabilities

- 14.2. For restructuring and insolvency services the Supplier must be able to offer **all** seven primary capabilities in clauses 14.2.1 - 14.2.7 to the required Standards.

- 14.2.1. Accelerated Mergers and Acquisitions
- 14.2.2. Business review
- 14.2.3. Cash-flow review
- 14.2.4. Distressed debt restructuring
- 14.2.5. General restructuring advice
- 14.2.6. Insolvency contingency planning
- 14.2.7. Options analysis

Additional capabilities

- 14.3. The Supplier may be able to offer **any** of the six additional capabilities listed in clauses 14.3.1 - 14.3.6 providing that they can evidence ability to deliver these service lines to the required standard. These additional capabilities require specialist expertise not covered by the primary capabilities in clauses 14.2.1 - 14.2.7. The Supplier and the Buyer will agree and set out in the Call-Off Contract which Services fall under primary versus additional services.

- 14.3.1. Capital markets advice
- 14.3.2. Economic consulting (Market Economy Operator Principle - "MEOP")
- 14.3.3. International insolvency advice
- 14.3.4. Pensions advisory
- 14.3.5. Restructuring tax advice
- 14.3.6. Special administration regimes

Sector specialisms

- 14.4. The Supplier may be able to offer **any** of the above primary (14.2.1 -

14.2.7) and additional capabilities (14.3.1 - 14.3.6) against **any** of the 12 sector specialisms in clauses 14.4.1 - 14.4.16 providing that they can evidence capability in these sectors to the required standard. The Supplier and the Buyer will agree and set out in the Call-Off Contract which Sector specialism will apply to their engagement.

- 14.4.1. Advanced manufacturing, which includes aerospace manufacturing, automotive manufacturing, computers and electrical equipment manufacturing, machinery and equipment manufacturing, shipbuilding, chemicals manufacturing, and space
- 14.4.2. Aviation
- 14.4.3. Business services, which includes outsourcing, professional services, recruitment services and facilities management
- 14.4.4. Construction
- 14.4.5. Consumer, which includes retail, consumer goods, tourism, hospitality and leisure
- 14.4.6. Defence
- 14.4.7. Education
- 14.4.8. Energy, which includes electricity, gas markets, civil nuclear, oil and gas and refined petroleum products manufacturing
- 14.4.9. Financial services
- 14.4.10. Health and social care
- 14.4.11. Heavy industry, which includes agri-tech, cement manufacturing, composites, construction material, ceramics, plastics manufacturing, rail manufacturing, paper manufacturing, mining, steel manufacturing, fabricated metal products manufacturing and other energy intensive industries
- 14.4.12. Local authorities
- 14.4.13. Sports and leisure
- 14.4.14. Technology, media and telecoms
- 14.4.15. Transport (excluding aviation) which includes maritime and ports, road haulage and logistics, rail, warehousing and storage, and postal and courier services
- 14.4.16. Utilities