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**User Guide** | Ref No: 1101

# Occupational Health, EAP and Associated Services



# 1101 - Occupational Health and Employee Assistance Programmes

## About YPO

YPO provides procurement solutions for public sector organisations to set up or renew contracts for a wide-range of services. Established in 1974 by a group of 13 local authorities, we're one of the largest public sector buying organisations in the UK and we're still 100% publicly-owned today. We work closely with our suppliers and collaborate with other public sector buying organisations to achieve efficiencies and value for money, returning all our profits back into the heart of the public sector.

Our team of qualified procurement professionals can offer advice, guidance and expertise on procurement, as well as regular engagement and communication to make sure your objectives are achieved.

## Framework Overview

### Start date

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1 October 2022

### Expiry date

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20 September 2026

### Extension(s) (if applicable)

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1 x 24 months

### Contracting authority (CA) call-off period

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4 years

### Contract notice ref. no

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2022/S 000-010052

### Corrigendum (if applicable)

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2022/S 000-013643

### Potential maximum value

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£80m - £90m

### Rebate

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1% paid by supplier/provider

### Geographical Location(s)

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National



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## Background to the framework

This is the second iteration with a collaboration of London Borough of Islington and YPO on the Occupational Health and Employee Assistant Programme framework.

YPO are a 100% publicly owned buying organisation who establish national and regional frameworks to meet the common needs of local authorities and the wider public sector. Through the previous iteration of the framework the collaboration carried out user and provider engagement through 1-2-1 meetings, surveys and working forums. Alongside prior information notices for this iteration and looking at ways to ensure a simple and easy process for public sector organisations; the engagement helped create a specification and subplot structure that consisted of a wide range of occupational health and EAP solutions to cover the UK.

## Specification, overview and lot structure

The framework will cover all services that are required by public sector organisations in relation to Occupational Health and Employee Assistant Programmes.

This framework has been split into two main Lots with Lot 1 further split down into geographical sublots. Each Lot/Sublot has the option to direct award, whereby a customer selects a supplier without running a competition based on their specific requirements, or via a further competition, in which a customer runs a small competition providing suppliers with the details of their requirement, and each supplier provides a quote based on this information.

**Lot 1 (a-j)** - Occupational Health to work with customers in reducing employee sickness absence, address the causes of work-related ill health, promote general wellbeing and implement an occupational health management system that is electronically enabled.

**Lot 2** - Employee Assistant Programme to help enable customers to meet legal, moral and financial obligations with respect to employee health and ensure a valued, healthy and efficient workforce.

An NDA has to be signed and returned before pricing and additional documentation will be supplied

Lot Structure			
Lot	Description	Providers per lot	Method of award 'Call-Off' contracts
1	Occupational Health Solutions and Associated Services	-	-
1 (a)	North West	7 Suppliers	Direct award or by Further competition
1 (b)	North East	6 Suppliers	Direct award or by Further competition
1 (c)	Yorkshire and The Humber	6 Suppliers	Direct award or by Further competition
1 (d)	East Midlands	6 Suppliers	Direct award or by Further competition
1 (e)	East of England	7 Suppliers	Direct award or by Further competition
1 (f)	West Midlands	6 Suppliers	Direct award or by Further competition
1 (g)	London and Surrounding Areas	7 Suppliers	Direct award or by Further competition
1 (h)	South East	7 Suppliers	Direct award or by Further competition
1 (i)	South West	7 Suppliers	Direct award or by Further competition
1 (j)	National	6 Suppliers	Direct award or by Further competition
2	Employee Assistance Programmes and Associated Services	7 Suppliers	Direct award or by Further competition

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## Benefits of using the Framework Agreement

YPO's framework agreements are established to allow customers to purchase goods, works or services from suppliers/providers via either direct award or further competition.

Benefits of using the framework agreement:

- Pricing established for two years on core specification and additional services.
- Direct award for core specification and additional service.
- Write your own specification for further competition.
- Template documentation available for further competition.
- YPO can fully manage the customers further competition (call-off) process if required.
- Reduced timescales – customers do not need to run a full procurement if procuring via the framework agreement.
- Assured supplier standards – suppliers/providers are 'pre-qualified' as to their general suitability.
- Aggregation of spend - customers will receive the benefits of the aggregated spend volume and increased leverage in the market.
- Pre-Defined Terms and Conditions - When awarding contracts customers have the option to supplement the pre-agreed call off terms and conditions established at framework level. Customers must ensure any supplementary terms and conditions are included within their order form and mutually agreed by both parties at the time of call off.

## Supplier/providers

Supplier/provider	Lot/Sub-lot
Abbott Healthcare Connections	Lots 1 a-j & 2
Cordell Health Limited	Lots 1g, 1h, 1i
Health Assured Ltd	Lot 2
Health Partners	Lot 1 a-j
Innovate HMG	Lot 1 a-j
Kays Medical	Lot 1 a-j
Medigold Health Ltd	Lot 1 a-j
People Asset Management Ltd	Lots 1 a-j & 2
Pluxee UK Ltd	Lots 2
SME HCI Ltd	Lot 2
The MCL Group (Int) Ltd	Lot 1a & 2
Vita Health Group	Lot 2
Workplace Health Wellbeing	Lot 1e



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## How to award/call off the framework

YPO conducted a thorough compliant tendering process, suppliers/providers offering the most economically advantageous tender (MEAT) have been accepted on to the framework.

The elements of the tender were commercial evaluation and qualitative evaluation against the criteria and weighting below:

Lot/ Sub-lot	Criterion	Percentage Weightings
Lot 1 a - j	Cost	40%
	Non-Cost: Quality	50%
	Non-Cost: Social Value	10%
Lot 2	Cost	40%
	Non-Cost: Quality	50%
	Non-Cost: Social Value	10%

## Direct award

The customer will award a call-off contract without re-opening competition for the core specification and additional service. A direct award can be made to a supplier if the participating customer can demonstrate the selected provider offers the most economically advantageous 'Tender'. For a direct award, the customer will use the specific call-off terms and conditions without any amendments, complete the order form and send to the selected supplier/provider.

## Further competition

The customer will award a call-off contract following a further competition exercise. The customer can use their own specific award criteria and invite all successful suppliers/providers from that lot/framework agreement to submit a "sealed bid".

Customers can decide how to split weightings and allocate points in accordance with their own Occupational Health and or Employee Assistant Programme Strategy, Customers can amend the below criteria (Cost and Non-Cost) by +/- 10% to suit their commercial needs and assessment.

**'The minimum weighting for social value is 10% therefore the weighting cannot be used to facilitate higher quality or cost weightings.'**

The overall award criteria weightings must still total 100% please see the table below:

Criteria for further competitions	Range
Cost	40%
Non-Cost: Quality	50%
Non-Cost: Social Value	10%

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## How to award/call off from the framework

For a further competition, customers have the option to supplement the pre-agreed call off terms and conditions established at framework level. Customers must ensure any supplementary terms and conditions are included within their further competition documentation/order form as these must be mutually agreed by both parties at the time of call off.

Evaluation must be fair and transparent, and the methodologies used to evaluate must be provided to the suppliers/providers within the further competition documentation. YPO can help customers produce specifications, qualitative questions, pricing schedules and evaluation criteria to undertake a further competition. Clarification responses, evaluation of further competition submissions, drafting of award letters and contracts and applicable Contract Award Notices are elements of the process that will need to be completed by the customer. Customers must inform YPO of the outcome of any further competition they undertake themselves.

When running a further competition, customers should award based on the most economically advantageous tender (MEAT) and must provide suppliers/providers with the methodology behind the evaluation, including the evaluation criteria and the weightings that are applied.

## Terms and conditions

Providers awarded onto the framework agreement have pre-agreed to YPO's standard Terms and Conditions established at framework level. When awarding contracts customers have the option to supplement the pre-agreed call off terms and conditions established at framework level.

Customers must ensure any supplementary terms and conditions are included within their order form and mutually agreed by both parties at the time of call off. The customer has the provision available under the call off terms and conditions to vary the contract provided this is in line with the terms outlined and is mutually agreed by both the customer and supplier.

## Contact information

For further information or to discuss individual requirements, please use the contact details below:

### ***Rachael Mann***

Category Buyer | HR and People Services

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## Stage 1 Initial customer enquiry

- Customer contacts YPO for information • YPO will send the customer a copy of the User Guide Access Agreement • Customer completes and returns Access Agreement
- Customer may provide YPO with a list of local suppliers that need to be approached to be included onto the framework • YPO will evaluate the additional suppliers in advance of the further competition



## Stage 2 Access Agreement returned to YPO

- Following receipt of a signed Access Agreement YPO may send the customer a Further Competition Template, a copy of the ITT question bank and framework Scope • YPO may provide the customer with a unique reference code for the further competition, which will be referenced on all documentation • The customer completes the documents and sends them to YPO • If the customer decides to undertake their own further competition YPO must be informed via e-mail



## Stage 3 Further competition

- YPO will issue further competition documents to all suppliers on the framework. Suppliers will be given a minimum of 10 days to submit their bid • YPO will manage any clarifications that are received from potential suppliers (customers will need to provide clarification responses)
- At the submission closing date, YPO will provide customers with access to all submissions
- Customers can then evaluate the submissions and prepare acceptance and rejection letters



## Stage 4 Contract Award

- YPO will issue the award decision documentation (acceptance and rejection letters) via YPO's e-portal • Optional 10-day standstill period: customers are advised to implement a voluntary standstill period of 10 days
- A Contract Award Notice (FTS and Contracts Finder) following any award via the framework must be published by the customer within 30 days of the award