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Tender

Flexible Employee Benefits, Personal Vehicle Leasing & Financial Wellbeing 2022

HealthTrust Europe LLP (HTE) acting as agent for the University Hospitals of Coventry and Warwickshire NHS Trust (“UHCW”)

F02: Contract notice

Notice identifier: 2022/S 000-000700

Procurement identifier (OCID): ocids-h6vhtk-030954

Published 10 January 2022, 10:45pm

Section I: Contracting authority

I.1) Name and addresses

HealthTrust Europe LLP (HTE) acting as agent for the University Hospitals of Coventry and Warwickshire NHS Trust (“UHCW”)

19 George Road

Edgbaston, Birmingham

B15 1NU

Email

customercare@HTEPG.com

Telephone

+44 08458875000

Country

United Kingdom

NUTS code

UK - United Kingdom

Internet address(es)

Main address

<https://healthtrusteurope.bravosolution.co.uk>

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://healthtrusteurope.bravosolution.co.uk>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://healthtrusteurope.bravosolution.co.uk>

Tenders or requests to participate must be submitted to the above-mentioned address

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at

<https://healthtrusteurope.bravosolution.co.uk>

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Health

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Flexible Employee Benefits, Personal Vehicle Leasing & Financial Wellbeing 2022

Reference number

SF053271

II.1.2) Main CPV code

- 79631000 - Personnel and payroll services

II.1.3) Type of contract

Services

II.1.4) Short description

The purpose of this tender is to establish a framework for the provision of access to a wide range of Employee Benefits, Personal Vehicle Leasing and Financial Wellbeing suppliers.

Under Lot 1a: Flexible Employee Benefits - Managed Service with Digital User Platform the Supplier will be able to provide a Managed Service for a core range of Employee Benefits, including access to Salary Sacrifice schemes, including: Cycle to Work, Buying and Selling of Annual Leave, Affordable Technology, Payroll Giving, Childcare Vouchers and Pensions. The Lot will also facilitate access to products and services that are designed to enhance Employee wellbeing, rewards and recognition, including: Reward and Recognition, Employee Discounts, Discounted Gym Memberships, Salary Deducted Loans and Health Cover.

Under Lot 1b: Flexible Employee Benefits - Individual Scheme Providers the Supplier will be able to provide any combination of one or more of a core range of Employee Benefits including access to Salary Sacrifice schemes, including: Cycle to Work, Buying and Selling of Annual Leave, Affordable Technology, Payroll Giving, Childcare Vouchers and Pensions. The Lot will also facilitate access to products and services that are designed to enhance Employee wellbeing, rewards and recognition, including: Reward and Recognition, Employee Discounts, Discounted Gym Memberships, Salary Deducted Loans and Health Cover. Note –

any Supplier successfully awarded to Lot 1b will only be permitted to supply the Specific Services for which they have been awarded.

Under Lot 2: Personal Vehicle Leasing the Supplier will be able to provide Personal Vehicle Leasing, allowing Participating Authorities to put in place a scheme for Employees to lease a vehicle for personal within a Salary Sacrifice scheme. The Lot will require Suppliers to give particular focus to Green Initiatives in support of mass adoption of ULEV, Full Electric and Hybrid vehicles.

Under Lot 3: Financial Wellbeing the Supplier will be able to provide Financial Wellbeing resources and online tools to Employees of Participating Authorities, to support staff with effective financial management and planning, including access to money management tools (including early access to salary or wages) for employees, salary deducted loans, employee savings, employee pensions (Additional Voluntary Contributions), information and guidance on use of the tools and services offered by awarded Suppliers, impartial financial products and services advice and debt management, low-cost borrowing solution and savings or investment products and services advice.

II.1.5) Estimated total value

Value excluding VAT: £1,280,000,000

II.1.6) Information about lots

This contract is divided into lots: Yes

Tenders may be submitted for all lots

Maximum number of lots that may be awarded to one tenderer: 4

II.2) Description

II.2.1) Title

Employee Benefits – Managed Service with Digital User Platform

Lot No

1a

II.2.2) Additional CPV code(s)

- 18530000 - Presents and rewards

- 30200000 - Computer equipment and supplies
- 32500000 - Telecommunications equipment and supplies
- 75310000 - Benefit services
- 75340000 - Child allowances
- 79630000 - Personnel services except placement and supply services
- 79631000 - Personnel and payroll services
- 79997000 - Business travel services

II.2.3) Place of performance

NUTS codes

- UK - United Kingdom

II.2.4) Description of the procurement

Under this Lot the Supplier will be able to provide as a Managed Service and via a Digital User Platform access to the core range of Employee Benefits including:

Salary Sacrifice - Cycle to Work,

Salary Sacrifice - Buying and Selling of Annual Leave,

Salary Sacrifice - Affordable Technology,

Salary Sacrifice - Payroll Giving,

Rewards and Recognition

Employee Discounts

Discounted Gym Membership

Salary Deducted Loans

Insurance and Wellbeing Services including Health Cover

The Lot may also facilitate access to Supplementary Products and services that are designed

to enhance employee wellbeing, rewards and recognition, including:

Eyecare Voucher Scheme

Childcare Voucher Scheme

Salary Sacrifice – Pensions (additional voluntary contributions)

TERMS AND CONDITIONS / ACTIVITY BASED INCOME (ABI).

The terms and conditions of this Framework Agreement and any resulting Call-Off contract is appended to the ITT. These terms include provisions requiring the payment by the supplier of an ABI management charge in consideration of the award of this framework agreement, the management and administration by HTE of the overall contract structure and associated documentation, as well as the requirement to submit regular management information to HTE.

SUBMISSION OF EXPRESSIONS OF INTEREST AND PROCUREMENT INFORMATION

This exercise will be conducted on the HTE Bravo portal. Candidates wishing to be considered must register expressions of interest as follows: Register on the HTE portal at <https://healthtrusteurope.bravosolution.co.uk>. Login to the portal with username/password. Click the PQQs/ITTs Open to All Suppliers link. These are the PQQs/ITTs open to any registered supplier. Click on the relevant PQQ/ ITT to access the content. Click the Express Interest button at the top of the page. This will move the PQQ/ITT into your My PQQs/My ITTs page. You can access any attachments by clicking Buyer Attachments in the PQQ/ITT Details box. Follow the onscreen instructions to complete the PQQ/ITT. Submit your reply using the Submit Response button

at the top of the page. If you require any further advice, contact the Bravo eTendering Help Desk at help@bravosolution.co.uk. Sid4Gov HTE utilises the sid4gov supplier information database. Candidates should register on sid4gov at <https://sid4gov.cabinetoffice.gov.uk/organisation/register> and submit their sid4gov company profile for publication on the database. Candidates already registered on sid4gov must ensure information is up to date. Where access to sid4gov is unavailable, please contact the sid4gov helpdesk at sid4gov@gps.gsi.gov.uk. Please note that sid4gov does not prepopulate any fields of the PQQ on HTE's Bravo portal. Candidates must complete the Qualification & Technical Envelopes of the PQQ in Bravo in full.

II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £380,000,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

24

This contract is subject to renewal

Yes

Description of renewals

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: Yes

Description of options

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

II.2) Description

II.2.1) Title

Employee Benefits – Specific Scheme providers

Lot No

1b

II.2.2) Additional CPV code(s)

- 18530000 - Presents and rewards
- 30200000 - Computer equipment and supplies
- 32500000 - Telecommunications equipment and supplies
- 75310000 - Benefit services
- 75340000 - Child allowances
- 79630000 - Personnel services except placement and supply services
- 79631000 - Personnel and payroll services

II.2.3) Place of performance

NUTS codes

- UK - United Kingdom

II.2.4) Description of the procurement

Under this Lot the Supplier will be able to provide via a Digital User Platform to access to any one or more of the following range of Core Services:

Salary Sacrifice - Cycle to Work,

Salary Sacrifice - Buying and Selling of Annual Leave,

Salary Sacrifice - Affordable Technology,

Salary Sacrifice - Payroll Giving,

Rewards and Recognition

Employee Discounts

Discounted Gym Membership

Salary Deducted Loans

Insurance and Wellbeing Services including Health Cover

The Lot will also allow Suppliers to provide access to Supplementary Services that are designed to enhance employee wellbeing, rewards and recognition, including:

Eyecare Voucher Scheme

Childcare Voucher Scheme

Salary Sacrifice – Pensions (additional voluntary contributions)

Note – any Supplier successfully awarded to Lot 1b will only be permitted to supply the Specific Services for which they have been awarded.

TERMS AND CONDITIONS / ACTIVITY BASED INCOME (ABI).

The terms and conditions of this Framework Agreement and any resulting Call-Off contract is appended to the ITT. These terms include provisions requiring the payment by the supplier of an ABI management charge in consideration of the award of this framework agreement, the management and administration by HTE of the overall contract structure and associated documentation, as well as the requirement to submit regular management information to HTE.

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prepopulate any fields of the PQQ on HTE's Bravo portal. Candidates must complete the Qualification & Technical Envelopes of the PQQ in Bravo in full.

II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £380,000,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

24

This contract is subject to renewal

Yes

Description of renewals

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: Yes

Description of options

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

II.2) Description

II.2.1) Title

Personal Vehicle Leasing

Lot No

2

II.2.2) Additional CPV code(s)

- 34000000 - Transport equipment and auxiliary products to transportation
- 34100000 - Motor vehicles
- 34110000 - Passenger cars
- 34111000 - Estate and saloon cars
- 34111100 - Estate cars
- 34111200 - Saloon cars
- 34113000 - 4-wheel-drive vehicles
- 34113100 - Jeeps
- 34113200 - All-terrain vehicles
- 34113300 - Off-road vehicles
- 34115000 - Other passenger cars
- 66114000 - Financial leasing services
- 79631000 - Personnel and payroll services

II.2.3) Place of performance

NUTS codes

- UK - United Kingdom

II.2.4) Description of the procurement

Under this Lot the Supplier will be able to provide via a Digital User Platform Personal Vehicle Leasing, allowing Participating Authorities to put in place a scheme for Employees to lease a vehicle for personal use within a Salary Sacrifice scheme.

The Lot will require Suppliers to give particular focus to Green Initiatives in support of mass adoption of ULEV, Full Electric and Hybrid vehicles.

TERMS AND CONDITIONS / ACTIVITY BASED INCOME (ABI).

The terms and conditions of this Framework Agreement and any resulting Call-Off contract is appended to the ITT. These terms include provisions requiring the payment by the supplier of an ABI management charge in consideration of the award of this framework agreement, the management and administration by HTE of the overall contract structure and associated documentation, as well as the requirement to submit regular management information to HTE.

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II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £500,000,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

24

This contract is subject to renewal

Yes

Description of renewals

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: Yes

Description of options

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

II.2) Description

II.2.1) Title

Financial Wellbeing

Lot No

3

II.2.2) Additional CPV code(s)

- 66114000 - Financial leasing services
- 66170000 - Financial consultancy, financial transaction processing and clearing-house services
- 66171000 - Financial consultancy services
- 79211110 - Payroll management services
- 79631000 - Personnel and payroll services
- 85312310 - Guidance services

II.2.3) Place of performance

NUTS codes

- UK - United Kingdom

II.2.4) Description of the procurement

Under this Lot the Supplier will be able to provide via a Digital User Platform, Financial Wellbeing resources and online tools to Employees of Participating Authorities, to support staff with effective financial management and planning including:

Access to money management tools (including early access to salary or wages) for Employees;

Salary deducted loans;

Employee savings;

Employee pensions (Additional Voluntary Contributions);

Information and guidance on use of the tools and services offered by awarded Suppliers;

Impartial financial products and services advice; and

Debt management, low-cost borrowing solution and savings or investment products and services advice.

TERMS AND CONDITIONS / ACTIVITY BASED INCOME (ABI).

The terms and conditions of this Framework Agreement and any resulting Call-Off contract is appended to the ITT. These terms include provisions requiring the payment by the supplier of an ABI management charge in consideration of the award of this framework agreement, the management and administration by HTE of the overall contract structure and associated documentation, as well as the requirement to submit regular management information to HTE.

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II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £20,000,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

24

This contract is subject to renewal

Yes

Description of renewals

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: Yes

Description of options

The Framework is to run for 2 years initially with the option to extend by a further 2 years up to a maximum of 4 years at the discretion of HealthTrust Europe (2 + 2).

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions

HTE may request such information as may be requested pursuant to Regulation 58 of the Public Contracts Regulations. Details are provided in the Eligibility Envelope.

III.1.2) Economic and financial standing

Selection criteria as stated in the procurement documents

III.1.3) Technical and professional ability

Selection criteria as stated in the procurement documents

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Restricted procedure

IV.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement

Framework agreement with several operators

Envisaged maximum number of participants to the framework agreement: 12

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.2) Time limit for receipt of tenders or requests to participate

Date

9 February 2022

Local time

2:00pm

IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates

25 February 2022

IV.2.4) Languages in which tenders or requests to participate may be submitted

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 12 (from the date stated for receipt of tender)

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.3) Additional information

HTE is a central purchasing body who is able to carry out this tender exercise by virtue of its appointment

as an agent of UHCW. Notwithstanding HTE's relationship with UHCW, it is HTE conducting this tender

exercise and will execute the resultant framework agreement with successful bidders. The

bodies to whom

the use of this framework agreement will be open include all contracting authorities in the UK as defined in

Regulation 2 of the Public Contracts Regulations 2015 as may be updated from time to time. In particular,

the

following entities in the UK (particularly those of a health and/or social care nature) are envisaged as

framework agreement users: (1) All National Health Service (NHS) bodies in England, including but not

limited to (i) acute trusts (as listed at: <http://www.nhs.uk/servicedirectories/pages/acutetrustlisting.aspx>);

(ii) health and care trusts (as listed at: <http://www.nhs.uk/ServiceDirectories/Pages/CareTrustListing.aspx>);

(iii) mental health trusts (as listed at: <http://www.nhs.uk/ServiceDirectories/Pages/MentalHealthTrustListing.aspx>); (iv) clinical commissioning

groups (as listed at: <http://www.nhs.uk/ServiceDirectories/Pages/CCGListing.aspx>); (v) ambulance trusts

(as listed at: <http://www.nhs.uk/ServiceDirectories/Pages/CareTrustListing.aspx> (vi) area

teams (as listed at: <http://www.nhs.uk/ServiceDirectories/Pages/AreaTeamListing.aspx>); (vii) special health

authorities (<http://www.nhs.uk/ServiceDirectories/Pages/SpecialHealthAuthorityListing.aspx>); (viii) NHS

England; and (ix) clinical senates and strategic clinical networks. (2) All NHS bodies in Wales, including but

not limited to all (i) health boards; (ii) NHS trusts; (iii) the national delivery group; (iv) community health

councils; and (v) NHS Wales shared services partnership (as listed at

<http://www.wales.nhs.uk/nhswalesaboutus/structure>. (3) All NHS bodies in Northern Ireland (known as

Health & Social Care), including but not limited to: (i) health and social care trusts (as listed at:

<http://online.hscni.net/?s=Trust> (ii) health agencies (as listed at:

<http://online.hscni.net/?s=health+agencies> (iii) hospitals (as listed at:

<http://online.hscni.net/?s=hospitals>; and (iv) the Health and Social Care Board. (4) Social enterprises

undertaking some or all of the previous service provider functions of contracting authorities in relation to

health and/or social care services (including charitable incorporated organisations, cooperatives, industrial

and provident societies and community interest companies listed on the Companies House WebCheck

service). (5) Ministerial departments and non-ministerial departments of central

government, non-departmental agencies and other public bodies, and public corporations (as listed at:

<https://www.gov.uk/government/organisations>). (6) Devolved governmental and parliamentary

organisations within the UK, including but not limited to the Scottish Government, Scottish Parliament, and

Scottish public bodies (as listed at:

<http://www.scotland.gov.uk/Topics/Government/publicbodies/about/Bodies>), as well as the Welsh Government, Welsh Assembly and Welsh unitary authorities (as

listed at:

<http://www.assembly.wales/en/abthome/role-of-assembly-how-itworks/Pages/governance-ofwales>.

aspx (7) All local authorities (as listed at:
<http://local.direct.gov.uk/LDGRedirect/Start.do?mode=1>) (8) The

Ministry of Defence (as detailed
at:<https://www.gov.uk/government/organisations/ministry-of-defence>).

This list includes each organisation's successors and assigns, any equivalent organisations and associated

organisation created due to any organisational changes. This framework agreement will be open to any

bodies or organisations operating in the UK of a health, and/or social care nature or which have a similar

procurement need, and/or any UK based central government authority listed at Annex I of Directive

2014/24/EU, in respect of any goods or services to any of the above listed organisation.

VI.4) Procedures for review

VI.4.1) Review body

Legal Department, HealthTrust Europe

19 George Road, Edgbaston

Birmingham

B15 1NU

Telephone

+44 8458875000

Country

United Kingdom

Internet address

<https://healthtrusteurope.bravosolution.co.uk>

VI.4.2) Body responsible for mediation procedures

Legal Department, HealthTrust Europe

19 George Road, Edgbaston

Birmingham

B15 1NU

Telephone

+44 8458875000

Country

United Kingdom

Internet address

<https://healthtrusteurope.bravosolution.co.uk>

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

Precise information on deadline(s) for review procedures:

HTE will incorporate a standstill period at the point information on the award of the contract is communicated to tenderers. That notification will provide full information on the award decision. The standstill period, which will be for a minimum of 10 calendar days, provides time for unsuccessful tenderers to challenge the award decision before the contract is entered into.