

Essex Pension Fund Strategy Board	PSB 07
Date: 22 September 2021	

Essex Pension Fund Printing and Posting Contract

Report by the Director for Essex Pension Fund

Enquiries to Jody Evans 03330 138489

Executive Summary

An Out of Committee decision was made during August 2021 in regard to the decision to award Adare Sec Ltd the contract with the provision of Printing and Posting for the Fund. This paper outlines the process undertaken.

1. Purpose of the Report

- 1.1 To provide the Board with the outcome of the recent Printing and Posting Tender which was carried out in conjunction with Essex County Council's (ECC) Procurement Policy and Procedures.

2. Recommendations

- 2.1 That the Board note:

- the Out of Committee decision made during August 2021 to award the preferred bidder, Adare Sec Limited, a two-year contract with the option to extend for up to a further two years, subject to satisfactory performance; and
- the content of the report.

3. Background

- 3.1 Essex Pension Fund must ensure the Printing and Posting of the key legislative communications is carried out each year by the timeframe dictated by Legislation.
- 3.2 Each year the Fund has procured, for this service using the ECC Procurement Policy and Procedures via the Request For Quotes (RFQ) process.
- 3.3 However, due to the increase in Scheme Membership over the last few years and the increase in costs for printing and posting, the cost is now in excess of £100k. As a consequence, a medium risk procurement must be utilised in line with Procurement Contract Regulations 2015.

4. Tender Process

- 4.1 Through the Out of Committee Decision Making Process in April 2021, in consultation with the ECC Procurement Team, the Board agreed that a full Tender process is necessary.
- 4.2 The Invitation to Tender (ITT) was drafted between Fund Officers and the ECC Managers. In order to provide transparency and fairness to the market, it was agreed the ITT be split into two Lots:
 - Lot 1 – Printing; and
 - Lot 2 – Posting.
- 4.3 The ITT was issued as an 'open' tender therefore allowing any suitable Supplier to bid for one or more Lots. The ITT was published on Find a Tender Service (FTS) which has superseded Tender Electronics Daily (OJEU) and Contracts Finder.

5. Timeline

- 5.1 The key milestones in the process are set out below:

Date	Activity
07 June 2021	Issue of ITT
08 July 2021	Deadline for ITT responses
12-28 July 2021	Evaluation of ITT responses
30 July 2021	Out of Committee Paper to PSB to ratify the decision to award to the successful bidder
09 August 2021	Notify Suppliers and 10-day Standstill period commences
23 August 2021	Contract awarded
01 October 2021	Start of new Contract

6. Invitation to Participate

- 6.1 Suppliers were asked to provide various details including the background of their organisation and relevant Local Government Pension Scheme (LGPS) experience.
- 6.2 Each Lot was assessed individually for all Suppliers in terms of three criteria: Quality; Social Value; and Value for Money.
- 6.3 Four Suppliers submitted responses for both Lots by the 08 July 2021 deadline. These were:
- Adare Sec Limited;
 - Allied Publicity Services;
 - Corporate Document Services; and
 - Service Graphics Paragon.

7. Evaluation

- 7.1 Suppliers were evaluated on an 80% Quality (including 5% Social Value) and 20% Value for Money split across both Lots. ECC Managers carried out compliance of the Suppliers, whilst the panel made up of three Fund Officers carried out the 'Quality' aspect of the submissions (excluding Social Value).
- 7.2 Following the consensus meeting on 20 July 2021, scores were moderated for both Lots and an overall percentage score was given in order to provide the following rankings:

Organisation (Supplier)	Ranking
Adare Sec Limited	1 st
Allied Publicity Services	2 nd
Corporate Document Services	3 rd
Service Graphics Paragon	4 th

8. Award

- 8.1 Following agreement from the Board, the Procurement Team notified all tenderers of the outcome on 09 August 2021. The Alcatel (standstill) period of ten days was observed before the final Contract was awarded.
- 8.2 The Contract will commence on 01 October 2021, for a period of two years with an option to extend for a further two years, subject to satisfactory performance. The Contract will be supported by Key Performance Indicators (KPIs), which will be reviewed at periodic intervals.

9. Link to Essex Pension Fund Objectives

- 9.1 Deliver a high quality friendly and informative service to all beneficiaries and employers at the point of need.

9.2 Communicate in a friendly, expert, and direct way to our stakeholders, treating all our stakeholders equally.

10. Risk Implications

10.1 Failure to administer scheme correctly in line with all relevant Regulations and policies owing to circumstances such as, but not limited to:

- lack of regulatory clarity;
- system issues;
- insufficient resources.

10.2 Issuing incorrect or inaccurate communications leads to lack of understanding and/or complaints.

11. Communication Implications

11.1 The ECC Procurement Team will communicate with all Suppliers in regard to the outcome of this procurement.

12. Finance and Resource Implications

12.1 The cost for these services should be no more than £150k per year and will be met out of the Fund's existing 2021/22 Budget.

13. Background Papers

13.1 Out of Committee paper issued 30 July 2021.

13.2 Essex Pension Fund Printing and Posting Contact, PSB 17, 07 July 2021.

13.3 Out of Committee paper issued 06 April 2021.