**Appendix A**

## Selection / Award Criteria to be applied (suggested)

Part 1 – 3 quote process

LCPF have stipulated that they would like to appoint an organisation who fully understands changes in LGPS investments and how this impacts on the service required. Therefore they have stated that they would like the process to be based on:

* 75% Quality
* 25% Price.

Part 2 – Open OJEU tender

The criteria is to be decided in consultation with the appointed external advisor.

## Proposed Timescales

|  |  |
| --- | --- |
| **Action** | **Date** |
| Initial Stakeholder project commencement meetings | 1st August 2017 |
| (LCC internal orders) – Deadline Report Strategy to LCC Pension Committee to Democratic Services (Must be signed off by procurement, legal and finance teams previously) | 1st September 2017 |
| Pension Committee meeting | 15th September 2017 |
| 3 Quote Procedure Launched | 18th September 2017 |
| 3 Quote Responses Deadline | 2nd October 2017 |
| Evaluation | 2nd to 5th October 2017 |
| Award | 6th October 2017 |
| Preparation of Tender Documentation with External Advisor and Legal Assistance | 9th October to 1st December 2017 |
| ITT Documentation and OJEU Notice Released (Deadline) | 8th December 2017 |
| Deadline for Clarifications | 19th January 2018 |
| Deadline for Tender Submissions | 26th January 2018 |
| Evaluation Period: Including Interviews | 29th January to 16th February 2018 |
| Finalisation of Award and Head of Service Report | 19th to 23rd February 2018 |
| Head of Service Authorisation of Award Deadline | 23rd February 2018 |
| Standstill Letters Released Deadline | 26th February 2018 |
| Contract Award Deadline | 9th March 2018 |
| Mobilisation | 3 Weeks |
| Contract commencement date | 1st April 2018 |