PFB3038 NW

Pension Scheme (Defined Contribution) and Employee Benefits

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Key Information

Framework Start Date	01/06/2025
Current End Date	30/04/2030
Procurement Regulation	PCR2015

Framework Suppliers 2

AVIVA LIFE & PENSIONS UK LIMITED
PERSONAL GROUP HOLDINGS PLC

Lot Information

1 : Lot 1 Defined Contribution Pension Scheme (Master Trust)
AVIVA LIFE & PENSIONS UK LIMITED

2 : Group Life Assurance & Group Income Protection
AVIVA LIFE & PENSIONS UK LIMITED

3 : Flexible Benefits Platform
PERSONAL GROUP HOLDINGS PLC

Scope of Requirements

Lot 1 - A section in a pre-existing authorised master trust as a tailored solution for Member Institutions of the participating consortia ('FlexHE') that can be used to meet (or exceed) automatic enrolment requirements as a minimum. The scheme is available to Member Institutions to enrol staff as defined by each Employer into the DC arrangement. This may include staff employed by the Member Institution or through a wholly owned subsidiary across both academic and academic-related posts and/or professional services. This may include new employees only or existing employees. The new DC arrangement could also be made available to staff in existing Defined Benefit (DB) schemes should they choose to opt-out of the existing scheme subject to the rules and regulations of the DB scheme.

Lot 2 - The provision of Group Life Assurance (supporting an employee's beneficiary upon the death of the employee) and Group Income Protection (providing financial support to an employee unable to work due to long-term illness/injury) to staff of participating consortia Member Institutions as an employee benefit. It will be at the discretion of the Member Institution which of the available policies they elect to take-up. This lot does not include insurance broking services. Member Institutions can liaise directly with Aviva or via a third-party advisor to set up these employee benefits.

Lot 3 - The provision of a largely off the shelf flexible benefits platform for the management of employee benefits through a single centralised online platform that is customisable to the requirements of the participating consortia member institutions. The platform will offer a range of benefits that shall be available to employees who meet any relevant qualifying criteria established by the member institution. The Platform is configurable and facilitates the incorporation of existing employee benefits and offers access to benefits from reputable providers under the following categories of benefit: Health, Financial and Lifestyle & Well-being. This covers employees across the UK and may include employees overseas. This lot covers the provision of all software and any associated licensing. Potential Services include, but are not limited to system implementation and migration, and professional services around the range of benefits the member institution may seek to make available to employees. Value-added services and optional modules such as holiday tracking, absence management, total reward statements might be considered at Call-Off but are not mandatory.

Accessibility

Member Institutions of the participating consortia .

Call Off Method

Direct Award- See guidance in the User Guide.

Responsible Procurement

Range of alternative funds available (including passively and actively managed) to meet differing needs and investment approaches, including Ethical and responsible investment and Sharia compliant.

Added Value

• Default investment solution with 'universal' strategy or alternative options that target annuity purchase, cash withdrawal and drawdown.
• Flexibility for variable contribution rates for Employers and Employees to choose the required level, subject to the auto enrolment minimum.
• Flexibility to transfer to a different fund within the Scheme, vary contribution rates, take a contribution break and continue contributions irrespective of whether they have an active sector employer at that time.
• Defined governance, management and reporting structure supported by UCEA where appropriate.
• Access to digital tools including a pre-joining microsite and the MyWorkplace App which can be fully co-branded.

For further information, please refer to the Buyers Guide

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