

**Estates
Professional
Services RM3816 -
Deep Dive into Best Practice
methods for a successful
tender**



Crown
Commercial
Service

Estates Professional Services RM3816 – Deep Dive into Best Practice methods for a successful tender

Please keep your microphone muted throughout the presentation.

Questions are welcomed throughout the presentation via the chat function.

Any questions asked will be collated and answers will be provided at the end of the presentation.

Slides are available upon request.

Estates Professional Services RM3816

Estates Professional Services (EPS) provides access to services relating directly to both existing and new Assets or Land.

Our aim is to support customers in managing their full estates strategy requirements.

The services commence at the planning phase and then focus on the ongoing management of estate operation, through to disposal.

Support services can include: Early Planning and Design Support, Vertical Real Estate, General Property Management and Ongoing Property Advice.

Who uses EPS's Commercial Agreements?



Government
Departments



Emergency
Services



Health



Charities / 3rd Sector



Education



Devolved
Administrations



Local
Government



Housing Associations



What EPS has to offer



Today's topics

Brief overview of the Estates Professional Services Lot structure and to provide a link to obtaining Scope of Services.

How to conduct a successful procurement via the EPS framework RM3816, including hints and tips from the suppliers.

Q and A at the end of presentation (questions to be submitted via the chat function).

Services available on the EPS framework

There are a range of national and regional suppliers broken down into four service (Lots) options. 33% of suppliers on this framework are SME's.

- Lot 1: National Delivery (12 suppliers)
- Lot 2: Regional Delivery (8 panels, 3 – 7 suppliers)
- Lot 3: Vertical Real Estate (5 suppliers)
- Lot 4: Fully Managed FM and Property Service (5 suppliers)

Lot 1: National Delivery

12 suppliers listed on this Lot.

One stop-shop - All services mandatory (apart from International delivery optional service).

Suppliers should demonstrate national capability either directly or through supply chain partners.

Direct award for tasks up to £50k.

Services outlined are not an exhaustive list and requirements should be discussed with the supply base.

Lot 2: Regional Delivery

Up to seven selected suppliers in each regional panel.

Suppliers cannot be awarded on both Lot 1 and Lot 2.

The services are divided between mandatory and optional services.

Suppliers should demonstrate regional capability either directly or through supply chain partners.

Direct award for tasks up to £50k.

Lot 3: Vertical Real Estates

Five selected suppliers.

All Lot 3 services are mandatory.

Suppliers should demonstrate national capability either directly or through supply chain partners.

This Lot provides a range of traditional estates services together with a number of services to develop the digital agenda.

Lot 3: Vertical Real Estates (continued)

The Supplier shall provide advice, guidance, management and assurance on:

- The leasing of sites that have infrastructure and agreements in place with Infrastructure Providers, Emergency Services Network (ESN) or Mobile Network Operator's (MNO's).
- Sites where the Contracting Authority is the Tenant and VRE infrastructure is proposed or already exists.
- The use of buildings, mast or structure that may be used for antennas, solar panels or other appliances.
- Building masts or structures that may be used for signage, advertising and other purposes, along with all other aspects associated with those services.

Lot 4: FM & Property Managed Service

Five suppliers.

All Lot 4 services are mandatory.

Suppliers can provide a service should a customer require procurement capability / expertise.

Suppliers should demonstrate national capability either directly or through supply chain partners.

Direct award for tasks up to £50k.

Call Off process when using the EPS framework

Customers are eligible to both Direct Award and run a Further Competition on the EPS framework. Below is a general guideline for when deciding:



Accessing further information in relation to Call Off process

All relevant documentation concerning routes to market, can be found under the 'Documents' tab at the following website:

www.crowncommercial.gov.uk/agreements/RM3816

The documents available include:

- Scope of Services Table and Descriptions
- How to Direct Award
- How to Conduct a Further Competition

What does a tender timeline consist of?

- Pre Market Engagement.
- Publication of the Further Competition Invitation - the date you publish your tender.
- Clarification period start and closing date, as well as the deadline for the publication of responses to Tender Clarification questions.
- Deadline for submission of a Tender to the Authority Contract (Tender Submission Deadline) and also Date of Supplier Presentations (if required).
- Evaluations - who and when will evaluate the submissions?

What does a tender timeline consist of? (continued)

- Consider if evaluations will be split into commercial and technical?
- Does extra time need to be built in to discuss supplier's costs - face to face?
- Consensus - Independent and group to finalise.
- Award recommendation report.
- Expected commencement date for the Contract.

Pre-Market Engagement

Active pre-market engagement includes:

- Communicating to your potential bidder pool and engaging on scope.
- Quality / price matrix and analysing feedback.

This can be successfully achieved by doing the following:

- Running an Expression Of Interest or Request For Information, enabling you to communicate to your chosen pool of suppliers.

(Customers can share their scope of requirement and request for suppliers to submit example case studies and ask for specific feedback).

Pre-Market Engagement (continued)

- Hold 'Supplier / Industry' days, enabling customers to communicate to their chosen pool of suppliers about the project.

(This will help the supplier gain more information before beginning their response to the tender requirements – either formally or by conference call / webinar etc).

- Issue Questionnaires or a Capability Assessment, enabling customers to gauge market experience and ask any specific questions.
- If adhering to a tight deadline, customers can issue 'engagement emails'.

(This will enable customers to communicate to their chosen pool of suppliers about requirements and when they will be published to the market).

Pre-Market Engagement (continued #2)

The benefits of pre-market engagement include:

- Enabling chosen suppliers to have an understanding of what the requirements are, before the tender is published.
- Suppliers can ask questions about the requirements, shortening the clarification period once the tender is published.
- Suppliers can also provide feedback about the requirements, which may help shape how the tender is published.
- Suppliers can advise if the request does not make sense, and help the customer understand about how requirements could be priced.

Pre-Market Engagement (continued #3)

In summary, pre-market engagement enables suppliers to plan their resources so that they can respond to the best of their ability.

How CCS can help customers:

- Providing templates to help form an Expression of Interest / Request for Information. These can be found on the RM3816 webpage.
- Helping people understand timelines and milestone dates to issue a successful ITT, whilst communicating on customers' behalves about impending tender release dates.

www.crowncommercial.gov.uk/agreements/RM3816

www.crowncommercial.gov.uk/agreements/RM3741

Tendering Best Practice: Hints and Tips

Before publishing a tender, please make the following considerations as these can affect the number of responses and submissions received:

- Clearly name the tender and ensure this relates to the services required.

(Suppliers have to go through an internal Bid / No Bid process, and the more information the supplier can gather from the tender, the better).

- Consider your internal policies and strategies and how these are showcased in the ITT.

(Specific requirements should be clearly defined. Quality questions may also be included, to help evaluate in-line with the policy requirements).

Tendering Best Practice: Hints and Tips (continued)

- How is the ITT structured? Based on past feedback from suppliers, customers requirements may not be clearly defined within the ITT.

(The Scope of Services / Requirements are the most important element of the tender. This should be clearly formatted with as much information as possible.

These should also be easy to locate within the ITT, avoiding suppliers having to search through multiple schedules).

- Ensure the Scope of Requirements / Pricing is written in plain English and that any abbreviations are clearly defined in a glossary.

(Support in reviewing documents can be provided. If in any instance unsure, please seek guidance from CCS).

Tendering Best Practice: Hints and Tips (continued #2)

- Quality / Technical Questions asked within the ITT should be specific to the requirements.

(This will enable customers to evaluate against specific requirements rather than generally, allowing suppliers to respond in-line with service requirements.

- Cost vs Quality. All suppliers on the framework have gone through a rigorous vetting process and can provide a top quality service.

(Recent supplier feedback has shown that the quality / cost ratio may be weighted too high towards cost, often resulting in suppliers not bidding.

Quality may often be overlooked if the weighting toward cost is too high. Be clear & consistent on scoring methodology, weightings and assessment).

Tendering Best Practice: Hints and Tips (continued #3)

- Timings. The length of time an ITT is published for, is our suppliers biggest reason of why they 'No Bid'.

(Take into consideration the ITT requirements, when allowing time for suppliers to respond. If unsure please seek guidance from CCS.

Try and take into consideration National Holidays etc and also ensure to adhere to specified timeframes. Always outline clear timings for suppliers).

- Clarifications. Ensure to have a dedicated contact point for clarifications, and respond to questions within the key milestone dates.
- Call-Off Contract. Learn this document and understand how it can be utilised, to help maximise effective contract management.

Tendering Best Practice: Hints and Tips (continued #4)

- Call-Off Contract. Other things to be considered: KPIs, SLAs, Transparency Reports. Ensure these have been defined in the ITT.

Other elements to be considered:

- GDPR. This is dictated by the level of information being handled at call off.
- Security. Bespoke requirements above Cyber Essentials should be flagged in the ITT.
- Liability Levels. Suppliers listed on the framework all have a minimum liability level of £2m, however the call off contract defaults to £10m.

(This must be discussed with suppliers and defined in the ITT, depending on the customers requirements).

Further Competition: Tips and Trips

Tips:

- Active pre-market engagement.
- Consult the potential bidder pool.
- Engage on scope.
- Quality / Price matrix and record feedback.
- Streamlined tender documentation.
- Dedicated contact point for clarifications.
- Clear timings for key milestones within bid process.
- Clear and consistent scoring methodology, weightings and assessments.
- Ask relevant questions in relation to the project requirements.
- Detailed, timely and credible feedback for both successful and unsuccessful suppliers.

Further Competition: Tips and Trips (continued)

Trips:

- Internal stakeholder engagement and sign-offs. Could this add additional time?
- Is the customer using a portal or issuing direct by e-mail? Organise pre-supplier engagement to advise?
- Are there any conflicts to be noted?

Direct Awarding on EPS

- Understand what services you require from EPS.
- Complete a Customer User Agreement form which can be found under the 'Documents' tab of the RM3816 webpage.
- Email the form to CCS in order to obtain a reference number for your procurement, which should also be provided to the suppliers.
- Choose which Lot is most suitable for the requirement.
- Register to the CCS eSourcing portal via the link:

<https://crowncommercialservice.bravosolution.co.uk/web/login.html>

- Download the rates for the relevant Lot. A step-by-step guide can be found on the webpage under the 'Documents' tab, entitled: 'How to Access the Suppliers Maximum Framework Rates to review'.

Direct Awarding on EPS (continued)

- Evaluate all suppliers rates in-line with what the requirements are, in order to get an idea of cost - Direct Award cap is £50k.
- Evaluation criteria does not always need to be based on cost – CCS recommend customers liaise with suppliers, to further understand their capacity and lead times.
- Customers must keep a record of their decision making process which shows how the relevant conditions were applied.

(This should illustrate that all capable suppliers were considered each time an award was made and customers will also be expected to disclose this documentation, in the event of a challenge.

It is for each contracting authority to ensure they adhere to their own procurement / commercial governance).

Direct Awarding on EPS (continued #2)

- Once a supplier has been chosen, the RM3816 Call Off Contract will need to be completed. This can be found on the RM3816 webpage under the 'Documents' tab called: 'RM3816 Estates Professional Services Attachment 5 - Call Off Contract'.

Please note the following advice about how to complete the Call-Off Contract for a Direct Award:

- Customers entering into the Call-Off Contract following a Direct Award, should complete the Template Call-Off Order Form without modification to the Template Call-Off Terms governing the provision of the Services; and by inserting or confirming only those sections which are necessary for the Call-Off Contract to be formed.

Considering GDPR on EPS

Customers and Suppliers are advised to consult their own Data Protection Officers with regards to their organisations GDPR process.

Further information is available regarding GDPR in relation to CCS, upon request.

Useful Links:

www.gov.uk/government/publications/gdpr-customer-toolkit-guidance?utm_source=f8d7f632-0156-4556-a97e-e843e1f1d3a9&utm_medium=email&utm_campaign=govuk-notifications&utm_content=weekly

www.ccs heretohelp.uk/ccs-getting-ready-gdpr-need/

How to access EPS framework

All relevant framework documentation can be found by accessing the below website:

www.crowncommercial.gov.uk/agreements/RM3816

The documents and information available include:

Scope of services table and descriptions

EPS customer brochure

All Suppliers listed on the framework

Registering for forthcoming webinars

The EPS team will be running monthly webinars which cover the below topics, please be sure to register if you would like to attend:

www.eventbrite.co.uk/o/ccs-buildings-events-amp-webinars-17517035883

Next steps covering...pre market engagement / cost models / tendering

Introduction to Estates Professional Services RM3816

Contact us



info@crowcommercial.gov.uk



www.crowcommercial.gov.uk/agreements/RM3816



[@gov_procurement](https://twitter.com/gov_procurement)



[Crown Commercial Service](https://www.linkedin.com/company/crown-commercial-service)

Email address for customer engagement on the re-letting of the EPS framework:

ems-cps@crowcommercial.gov.uk



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