

# Estates Professional Services RM3816 – Next Steps



Crown  
Commercial  
Service

# Estates Professional Services RM3816 – Next Steps

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.

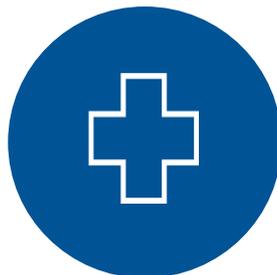
# Who uses EPS's Commercial Agreements?



Government  
Departments



Emergency  
Services



Health



Charities / 3rd Sector



Education



Devolved  
Administrations



Local  
Government



Housing Associations



# What EPS has to offer



# 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)

# Today's topics

**Pre-Market Engagement:** To understand best practice about pre-market engagement and also gain a deeper insight into the market, suppliers and their offerings.

**Cost Models:** Learning how to access and analyse the suppliers rates.

**Call-Off Contract:** Becoming familiar with a call-off contract prior to ITT.

**How to Tender:** Understanding how to Direct Award or conduct a Further Competition with best practice hints and tips.

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

# 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' behalfs about impending tender release dates.

[www.crowncommercial.gov.uk/agreements/RM3816](http://www.crowncommercial.gov.uk/agreements/RM3816)

[www.crowncommercial.gov.uk/agreements/RM3741](http://www.crowncommercial.gov.uk/agreements/RM3741)

# Pre-Market Engagement (continued #4)

Summary table to be considered:

<b>SHARE YOUR PIPELINE</b>	<b>CONSULT THE SPECIALISTS</b>	<b>CHECK WITH OFFICIAL CCS SUPPLIER CONTACTS</b>	<b>SCOPE OUT YOUR REQUIREMENT</b>	<b>SELL THE BENEFITS OF YOUR SCHEME</b>	<b>WARM THE MARKET</b>
<p>An opportunity is almost always more attractive if it is part of a wider programme of projects.</p>	<p>Suppliers may be able to guide you on how to improve your procurement.</p>	<p>Before sending out documents, double check with CCS-registered point of contacts to ensure your opportunity goes to the right person. This should avoid wasted time and result in you receiving more bids.</p>	<p>Time invested now saves time in later stages and delivers improved outcomes.</p>	<p>Consider why suppliers should bid your opportunity. Most consultants have limited bid resources and incur huge costs when bidding so they need to be selective. Highlight the positives.</p>	<p>This engages suppliers and gives them time to assign the best resources and assemble supply chains.</p>

# Pricing Methodology on EPS framework

In practice, the cost model provides a range of pricing including:

- Hourly rate by discipline - ranging from Director to Apprentice. There is also a percentage fee which has a minimum fee and a capped maximum fee.
- Fixed fee per service and an initial fixed fee for consultation which will then be discounted from the final percentage fee.
- Incentivised fees charged on % saving or % additional income and also price variance based on geography and property type.
- Rates are fixed for a minimum two year period and cannot be increased, these are the suppliers maximum rates which could be improved further.

# Pricing Methodology on EPS framework (continued)

The EPS framework facilitates the provision of services using pricing methodologies to provide the customer:

- Flexibility. The variables include: Geographical, London specific and property type variables allowing customers to tailor costs to their requirements.
- Incentivisation. A number of incentivised pricing methodologies or gain shares have been included to ensure the delivery of value for money.
- Transparency. Transparent pricing allows customers to easily understand the methodology and communicate this internally, ensuring necessary audit and governance approvals.

The listed Supplier rates include all aspects of expenses, including Travel.

# Cost Models on EPS framework

In order to gain access to the Cost Models you will need to register for the CCS eSourcing Portal, where you can then download Supplier rates by Lot.

Guidance on this can be found on both of the following webpage's:

[www.crowncommercial.gov.uk/agreements/RM3816](http://www.crowncommercial.gov.uk/agreements/RM3816)

[www.gov.uk/government/publications/esourcing-suite-guidance-for-customers](http://www.gov.uk/government/publications/esourcing-suite-guidance-for-customers)

Access to the eSourcing tool can be found by visiting:

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

# Cost Models on EPS framework (continued)

The EPS Cost Model has 19 tables which cover a variety of services. Key areas to understand when evaluating the costs models are:

- Understand your specification / scope of requirements.
- Align your services to the fee tables.
- Have a understanding of the different methodologies for the fee basis and any associated fee bands or service exclusions.
- Be transparent in what figures you will be evaluating from suppliers and associated weightings applied.
- If unsure, contact CCS for further guidance.

# Cost Models on EPS framework (continued #2)

Table 1: General hourly rates for EPS services include, but are not limited to:

## The Estate Professional Services Framework

Table 1 General hourly rates for EPS services:

Strategic advice, including preparation and development of an estate strategy  
 Procurement strategy for property related issues  
 Development consultancy and advice  
 Building surveying services  
 General advice on estates and property management  
 General Estate and Property Management Duties  
 Rent reviews – Contracting Authority is Landlord – Arbitration  
 Lease breaks and lease expiries  
 Lease renewal – Contracting Authority is Landlord Court proceedings  
 Dilapidations – reviewing/preparing Landlords claim and advice

Dilapidations – Court proceedings  
 Landlord and Tenant issues including Landlord consents, service charges and claims  
 General rating advice other than Tables 13 – 17  
 Valuation advice other than table 18  
 Planning  
 Compulsory purchase  
 Day lighting/sun lighting/overshadowing and rights of lights  
 Party wall awards  
 Way leaves and easements  
 Other neighborly matters

Agricultural Services

Hourly Rate (per hour)	Property type	National						
		Chartered Surveyor or Chartered Arbitrator (with at least 10 years post qualification experience in relevant field)	Professionally qualified Lead Partner/Direct or (with at least 10 years post qualification experience)	Other professionally qualified Partner/Direct or (with at least 10 years post-qualification experience.)	Professionally qualified Associate Partner/Direct or (with at least 5 years post-qualification experience.)	Professionally qualified Senior Surveyor (with at least 3 years post-qualification experience.)	Professionally qualified Surveyor	Graduate or Assistant Surveyor
	Office	£180.00	£125.00	£100.00	£75.00	£65.00	£60.00	£45.00
	Industrial	£135.00	£93.75	£75.00	£56.25	£48.75	£45.00	£33.75
	Retail	£180.00	£125.00	£100.00	£75.00	£65.00	£60.00	£45.00
	Residential	£162.00	£112.50	£90.00	£67.50	£58.50	£54.00	£40.50
	Land only	£198.00	£137.50	£110.00	£82.50	£71.50	£66.00	£49.50

# Cost Models on EPS framework (continued #3)

Table 18 (3.19) - Full valuations

The percentage fee for valuations in accordance with RICS valuations - Professional Standards 2012 (the 'Red book'), will be based upon the final agreed valuation.

Portfolio size	Fee %	Property Type (National)			
		Industrial	Retail	Residential	Land only
0 to 100,000	0.75%	0.56%	0.75%	0.68%	0.83%
100,001 - 250,000	0.50%	0.38%	0.50%	0.45%	0.55%
250,001 - 500,000	0.30%	0.23%	0.30%	0.27%	0.33%
500,001 - 2,500,000	0.15%	0.11%	0.15%	0.14%	0.17%
2,500,001 - 10,000,000	0.10%	0.08%	0.10%	0.09%	0.11%
10,000,001 - 30,000,000	0.05%	0.04%	0.05%	0.05%	0.06%
> 30,000,001	0.04%	0.03%	0.04%	0.04%	0.04%
<b>Maximum Fee</b>	<b>£1,000,000.00</b>	£1,000,000.00	£1,000,000.00	£1,000,000.00	£1,000,000.00

Property Type (London) Tranche fee %			
Office	Industrial	Retail	Residential
0.68%	0.51%	0.68%	0.61%
0.45%	0.34%	0.45%	0.41%
0.27%	0.20%	0.27%	0.24%
0.14%	0.10%	0.14%	0.12%
0.09%	0.07%	0.09%	0.08%
0.05%	0.03%	0.05%	0.04%
0.04%	0.03%	0.04%	0.03%
£1,000,000.00	£1,000,000.00	£1,000,000.00	£1,000,000.00

What is included in the cost:

- Fees represent the Supplier's maximum fees, based on a national rate and exclude VAT and are also based on the location of the activity (not the Suppliers location).
- Fees are based on the value range and are not tranche fees.

# Cost Models on EPS framework (continued #4)

- Suppliers shall offer discount at call-off to deliver the most economically advantageous tender.
- Fees include: expenses, provision of support / office resource, overheads, profits, office expenses, postage, delivery of documents, telephone calls.
- Customers can negotiate additional incentivisation with Suppliers to achieve targets, savings or additional income on transaction based estate services and lump sum fees.
- Fees are fixed for the first 2 years of the framework.

# 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](http://www.crowncommercial.gov.uk/agreements/RM3816)

The documents available include:

- Customer guidance
- How to Direct Award
- How to Conduct a Further Competition

# EPS framework Call-Off Contract

If customers utilise EPS's Framework agreement, they should also use the Call Off-Contract, located under the 'Documents' tab of the webpage.

Customers should familiarise themselves with the document as the order form itself is only 11 pages long.

Depending whether customers are Direct Awarding or running a Further Competition, this can be tailored to their requirements.

Before appointing a supplier, an initial call off-contract should be completed so the supplier is aware of the requirements.

CCS can support customers in the completion of the call-off contract.

# 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 ESP (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 ESP (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.

# 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?

# Further Competition: Example of ITT Timeline

- Publication of the Further Competition invitation.
- Clarification period start and closing date.
- Deadline for the publication of responses to Tender Clarification.
- Deadline for submission of a Tender to the Authority Contract, with a recommended minimum period of 10 working days between Tender Clarifications and Tender Submissions.
- Date of Supplier Presentations (if required).
- Evaluations - who and when will evaluate the submissions?

# Further Competition: Example of ITT Timeline (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.

# How to access EPS framework

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

[www.crowncommercial.gov.uk/agreements/RM3816](http://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](https://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



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[www.crowcommercial.gov.uk/agreements/RM3816](http://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:

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