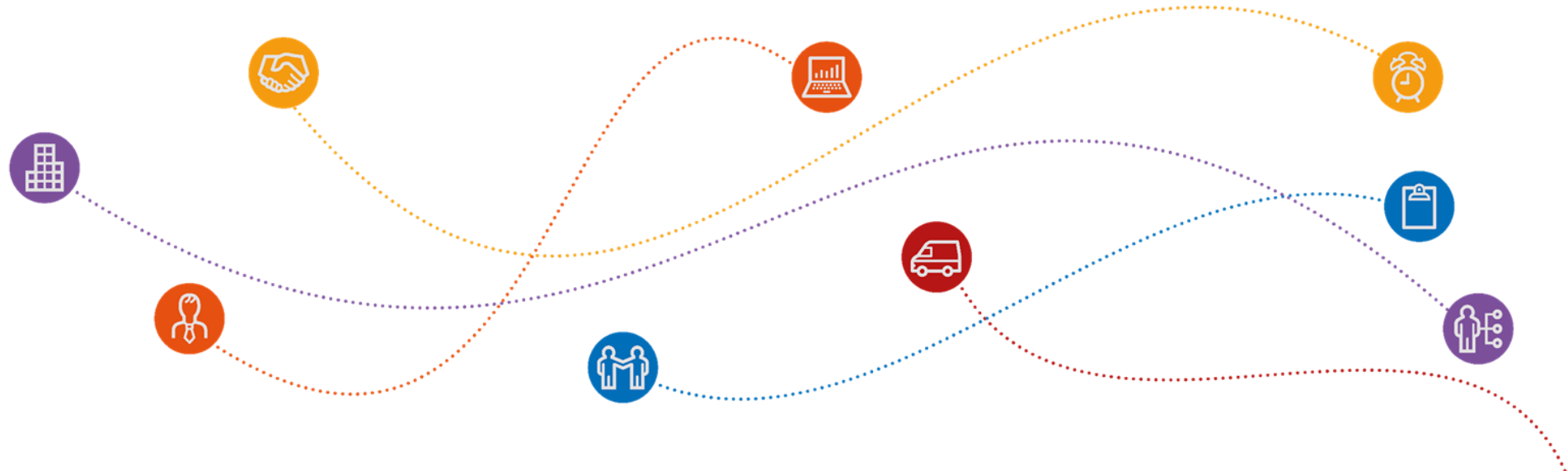




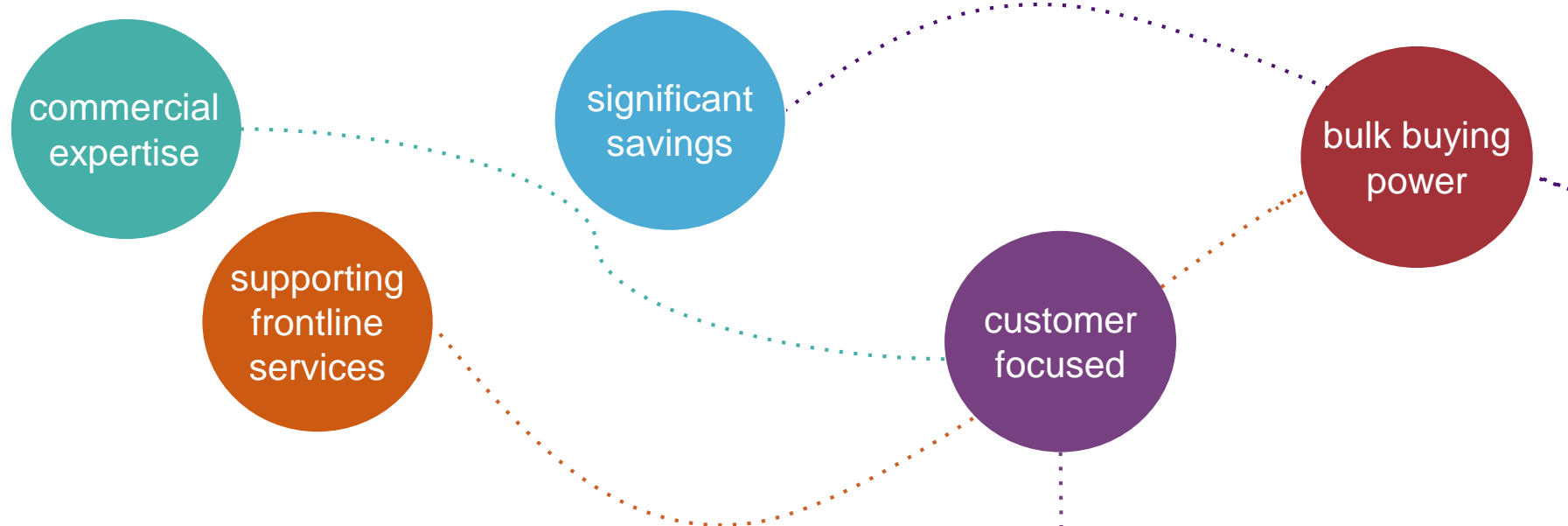
Crown
Commercial
Service

Welcome to Estates Professional Services (RM3816)



Introducing the Crown Commercial Service

We help organisations across the entire public sector save time and money on buying the everyday goods and services they need...



Our customers



Devolved
Administrations



Government
Departments



Local
Government



Housing
Associations



Emergency
Services



Health



Education



Charities /
3rd Sector

We aim to help our customers save £2 billion between 2016 and 2020

Property Services Team

Property Services Team

John Keller MIWFM

Associate Commercial Specialist

Caroline Peake MCIPS

Commercial Agreement Manager

Matt Davies MIWFM

Estates Category Lead

Ben Hurford MCIPS

Commercial Agreement Specialist

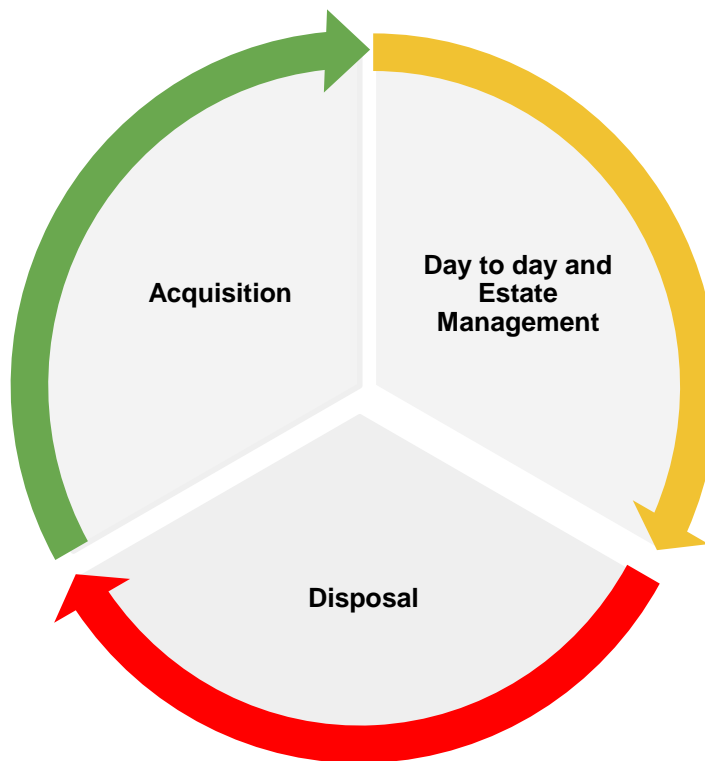
EPS Team

• info@crowcommercial.gov.uk



HOW CCS BUILDINGS FRAMEWORKS SUPPORT THE GOVERNMENT PROPERTY LIFECYCLE

Acquisition
Fit out
Project management full design team services
Building materials
Modular buildings*
Construction
EPS
Fleet (EV)*



Day to day
FM Services
CAFM/FM Assurance
Furniture
Utilities/Fuels
Linen and laundry
EPS

Disposal
EPS



Estates Professional Services

Professional property related services, which will enable customers to:

- Reduce property costs
- Release unwanted property assets
- Identify savings
- Identify opportunities to generate income from land and buildings.
- Meet central targets for reduced property occupancy
- Access to efficient, effective and compliant Estate Management expertise
- Access a verified supply chain with a mix of National and Local suppliers
- Access a Vertical Real Estate and Managed Procured service for both FM and Estate Management Services



Lotting structure

Lot 1
UK National - Multi Disciplinary
12 suppliers

Lot 2 - Regional Panels

South East &
London
5 suppliers

East Anglia
4 suppliers

East and
West
Midlands
6 suppliers

North East
England
5 suppliers

Scotland
3 suppliers

Northern
Ireland
1 supplier

North West
England &
North Wales
7 suppliers

South Wales
& South
West
England
5 suppliers

Lot 3
Vertical Real
Estate
5 suppliers

Lot 4
FM & Property
Services
Procurement
(Managed
Service)
5 suppliers



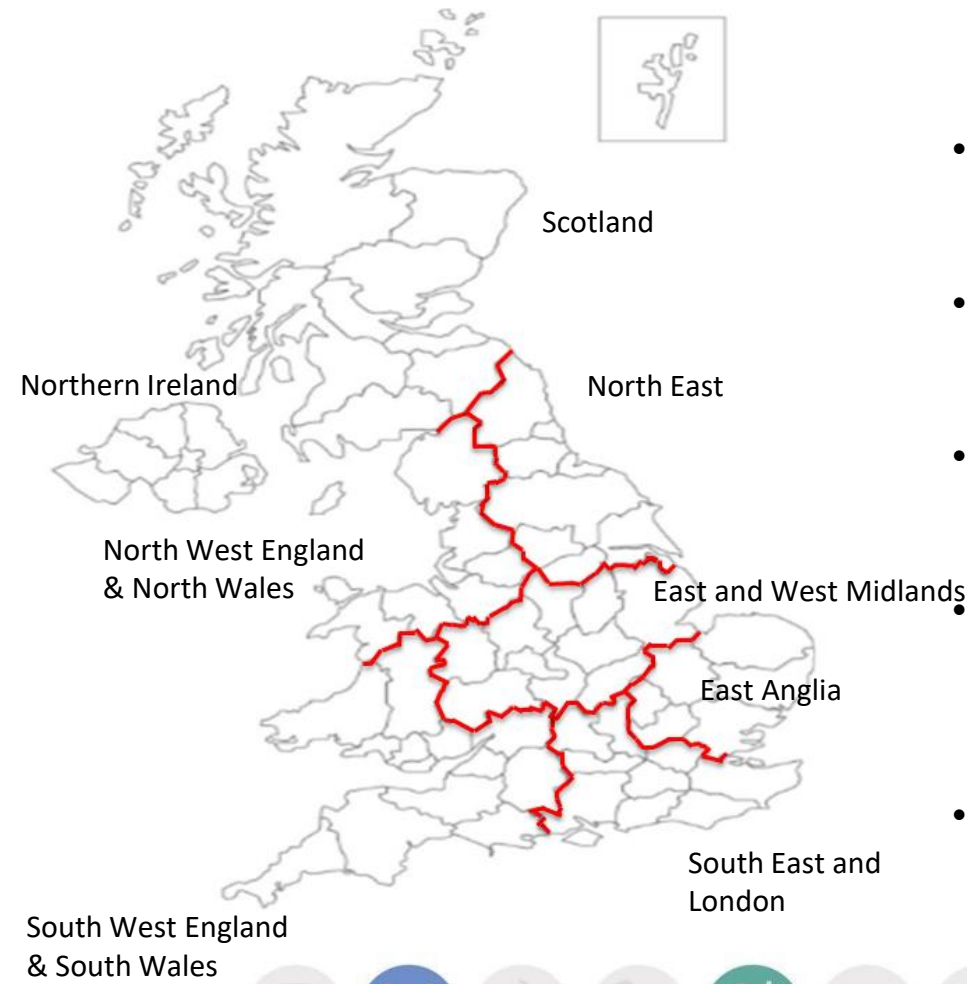
Lot 1 National Delivery



- 12 suppliers
- 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-discuss requirements with the supply base.



Lot 2 Regional Delivery



- Up to 7 selected suppliers in each regional panel
- Suppliers could not be awarded on both Lot 1 and 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



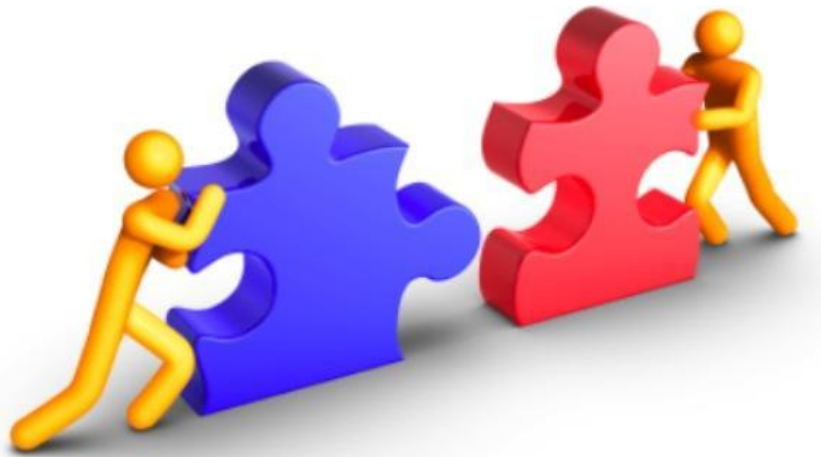
- 5 selected suppliers
- All Lot 3 services mandatory
- Suppliers should demonstrate national capability either direct or through supply chain partners
- The Lot provides a range of traditional estates services together with a number of services to develop the digital agenda.

The following financial models are available for Vertical Real Estate services:

- Gainshare model of a % revenue share of site revenues
- The customer may also consider an outright site rights purchase model in selected circumstances



Lot 4 FM & Property Managed Service



- 5 suppliers
- All Lot 4 services mandatory
- Should a customer require procurement capability/expertise
- Suppliers should demonstrate national capability either direct or through supply chain partners
- Direct award for tasks up to £50k



Scope of services

A sample of the services you're able to procure through the framework but not limited to:

Service	Lot 1	Lot 2	Lot 3	Lot 4
Acquisition of freehold and leasehold property	✓	✓	X	X
Disposal (includes letting or other commercial arrangements) of freehold and leasehold property	✓	✓	X	X
Rent reviews	✓	✓	X	X
Valuations	✓	✓	X	X
Lease renewals	✓	✓	X	X
Dilapidations - undertaking surveys / leading negotiations	✓	✓	X	X
Landlord and tenant issues including landlord consents, service charges and claims	✓	✓	X	X
Rating support services	✓	✓	X	X
Strategic advice, including the preparation and development of an estate strategy	✓	o	X	X



Scope of services continued

A sample of the services you're able to procure through the framework but not limited to:

Service	Lot 1	Lot 2	Lot 3	Lot 4
Planning	✓	✓	X	X
Building surveying services	✓	✓	X	X
General advice on estate and property management including strategy	✓	✓	X	X
General estate and property management duties, (landlord and tenant day to day)	✓	✓	X	X
Compulsory purchase	✓	o	X	X
Daylighting/ sunlighting/ overshadowing and rights of light	✓	✓	X	X
Party wall awards	✓	✓	X	X
Wayleaves and easements	✓	✓	X	X
RIBA stage planning (0 to 2 / part of pre-acquisition scope)	✓	o	X	X
Retail property services/management	✓	o	X	X



List of successful Suppliers:

Lot 1 National

Arcadis LLP
 BNP Paribas Real Estate Advisory & Property Management UK Limited
 Capita Business Services Ltd
 Carter Jonas LLP
 CBRE Limited
 Cushman Wakefield
 Gerald Eve LLP
 GVA GRIMLEY LTD
 Kier Business Services Ltd.
 Lambert Smith Hampton Group Limited
 Montagu Evans LLP
 Sanderson Weatherall LLP

Lot 2: Regional Panel 2A East Anglia

Copping Joyce Surveyors
 Essentia Trading Limited
 NPS Property Consultants Limited
 Savills (UK) Limited

Lot 2: Regional Panel 2B East and West Midlands

Bruton Knowles
 E3 Cube
 Fisher German LLP
 Savills (UK) Limited
 Valuation Office Agency

Lot 2: Regional Panel 2C London and the South East

Amey OW Limited
 Essentia Trading Limited
 Fisher German LLP
 Jones Lang LaSalle Limited
 Knight Frank LLP

Lot 2: Regional Panel 2D North East England

Bruton Knowles
 Knight Frank LLP
 NPS Property Consultants Limited
 Valuation Office Agency
 WYG Management Services Ltd

Lot 2: Regional Panel 2E North West England & North Wales

Amey OW Limited
 Fisher German LLP
 Jacobs U.K. Ltd
 Jones Lang LaSalle Limited
 Knight Frank LLP
 Valuation Office Agency
 WYG Management Services Ltd

Lot 2: Regional Panel 2F Northern Ireland

Lisney NI Ltd

Lot 2: Regional Panel 2G Scotland

FG Burnett Limited
 J&E Shepherd Chartered Surveyors
 Ryden LLP

Lot 2: Regional Panel 2H Wales and South West:

Alder King
 Bruton Knowles
 Jones Lang LaSalle Limited
 NPS Property Consultants Limited
 Savills (UK) Limited

Lot 3: Vertical Real Estate

David R Boyne property solutions Limited
 Lambert Smith Hampton Group Ltd
 Fisher German LLP
 Knight Frank LLP
 Savills (UK) Limited

Lot 4: Facilities Management and Property Services (Procurement Managed Service)

Arcadis LLP
 Capita Business Services Ltd
 Long O Donnell Associates Limited
 WT Partnership Limited
 WYG Engineering Limited

How to use and access the Estates Professional Service Framework RM3816

How to use and access the framework

- **Familiarise yourself with the RM3816 webpage**- this gives an overview about what the framework is about, the lotting structure, how to access and the benefits and background.
- Its also includes a documents tab, where you will find all relevant documents you will need in relation to RM3816 this includes...

RM3816 Framework Agreement

RM3816 Scope of services

OJEU Notice

Customer Brochure

Customer Guidance

Customer Presentation

Call Off Contract

Customer Further Competition Templates

Customer User Agreement

<http://ccs-agreements.cabinetoffice.gov.uk/contracts/rm3816>

How to use and access the framework

- **What Lot should you use?**- Depending on your requirements and your project, the customer makes this decision, whether to go national, regional, VRE or Managed Service route. CCS can provide advice and guidance when necessary but we do not influence this decision as it is down the customer and their internal strategy and requirements.
- **Customer User Agreement**- Which ever route you decide to take, you must fill in a Customer User Agreement, this is then returned to CCS by the customer, and we will assign you with a unique reference number and return this to you. This can then be given to the supply base when engaging with them. It also enables CCS to track delivery of specific projects between the Contracting Authority and the Supplier, collate project specific Management Information, which will support identification of spend and savings to a more granular project level, have better transparency of data and support system and data reviews during supplier audits.

Customer User Agreement

To engage or call off services with Suppliers you must complete a Customer User Agreement:

Please complete the following information and return this to: property@crowncommercial.gov.uk

Contact Details				
Contracting authority				
Contact name				
Contact number				
Contact email address				
Customer Call Off Requirements				
Nature of service requirement				
Framework agreement - Lot	1	2	3	4
Further competition/direct award				
Supplier(s) invited (if known)				
Value of call-off (if known)				
Planned commencement date				
Anticipated completion date (if known)				
Call-off contract to be used				

Upon receipt of the completed form you will be provided with a Customer User Agreement Reference Number. This should be quoted in your documentation when placing an order through the framework with your service provider(s). This should also be quoted to CCS when discussing the Call Off in question.

*Customer User Agreement - Reference Number	
---	--

*to be completed by Crown Commercial Service

<http://ccs-agreements.cabinetoffice.gov.uk/sites/default/files/contracts/Customer%20User%20Agreement%20form.docx>

Register for eSourcing Portal

Cost models are commercially confidential you can access via the CCS eSourcing Portal

- Visit <https://crowncommercialservice.bravosolution.co.uk/web/login.html>
- The above link contains a Customer Guidance document, which will enable you to register on the CCS eSourcing portal, along with some FAQs.
- The rates are uploaded by Lot, then once downloaded are by supplier.
- Please request a copy of Suppliers Rates from info@crowncommercial.gov.uk

Accessing RM3816 Rates

Evaluating The Rates

- Every organisation may have a slightly different way of procuring services they need and CCS is here to try and help you streamline your approach.
- We understand in certain organisations, spend over £2,000+ may require the contracting authority to go to further competition as they require at least 3 quotes.
- Direct award could still be an option in this instance, as you as the customer has access to all of the supplier's rates, and can evaluate all suppliers rates from your chosen lot and have an indicative idea on cost from all suppliers within your chosen lot without having to go to further competition.
- This could save time and speed up the process as direct award can be utilised to the value of 50k, and depending on which Lot you use, you can evaluate up to 12 suppliers rates.

The Estate Professional Services Framework facilitates the provision of services using pricing methodologies to provide the customer:

- Flexibility - we have included a number of variables including regional, 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 for services delivered
- Transparency - Providing transparency in pricing to allow customers to easily understand the methodology and communicate this internally to ensure necessary approval, audit and governance approvals.



Pricing methodology

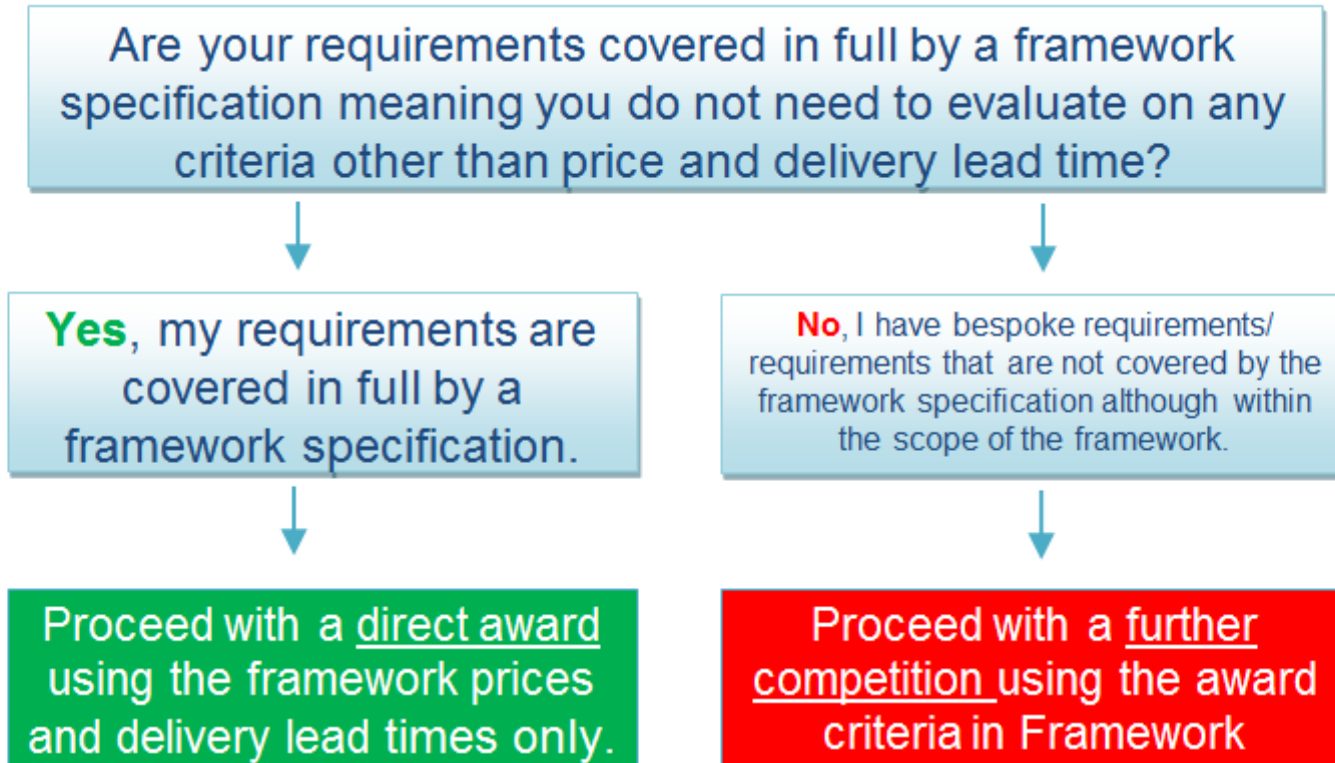
In practise the cost model provides a range of pricing

- Hourly rate by discipline - ranging from Director to Apprentice
- Percentage fee which has a minimum fee and a capped maximum fee
- Fixed fee per service
- Initial fixed fee for consultation which will then be discounted from the final percentage fee
- Price variance for London and property type office, residential, retail, industrial or Land
- Incentivised - fees charged on the % saving or % additional income

What is included in the cost?

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

General Rules for Call Offs



- A single form of contract available to customers, CCS Standard Terms and Conditions.
- Customer can add bespoke terms and conditions to the standard call off contract at further competition.
 - e.g. payment terms, security levels, KPIs, SLAs
- Customers can enter into long term agreements across the lifetime of the framework.

Call off process - How to Direct Award

- Estimated value of the proposed call-off contract is not greater than £50,000 plus VAT
- Download the supplier's rates from our eSourcing portal.
- Evaluate all suppliers rates from your chosen Lot in line with your requirements.
- Engage with the supply base, as you will need to discuss capacity and lead times.
- This should give you the required level of information to make an informed decision to Direct Award.
- Utilise the Call Off contract found on the RM3816 webpage to finalise your requirements.
- Customers are reminded of the need to keep a record of their decision making process which shows how the relevant conditions were applied, making it clear that all capable suppliers were considered each time an award was made. Customers will be expected to disclose this documentation to the court in the event of a challenge.
- It is for each contracting authority to ensure they adhere to their own internal procurement/commercial governance.

Call off process – Further Competition

- When running a further competition, customers will pull together a tender where they specify their requirement in full so the supplier has a full understanding of the services required- the customer, depending on timelines and complexity of their project the customer should hold a supplier engagement session combined with perhaps questionnaires for a capability assessment.
- Allow appropriate time for the tender once published- this should also include a clarification period should suppliers have any questions. The less time given, the poorer the response from the supply base will be.
- Evaluation Quality - Award criteria to be set by the Contracting Authority conducting the award (which in total should add up to 100%) can vary as much between 10%- 90%.
- CCS has developed a Call Off Template which can be used to run further competitions via the EPS framework. Whilst customers can use their own documentation, this template is specifically tailored to the requirements of this framework. This should ensure customers can run a compliant and efficient further competition process. This can be found on the documents tab of the RM3816 webpage called Customer Call Off Templates.
- Always provide feedback to the unsuccessful suppliers.
- Use the Attachment 5 Call Off contract to finalise the award

Call Off Contract

- If using RM3816, you must utilise the Call Off Contract Attachment 5 upon award.
- After having market engagement it was decided to only use the CCS Standard Call Off contract rather than NEC3 to keep the process more streamlined and simple.
- At further competition, the contracting authority can add in additional requirements which are bespoke to their needs, such as additional KPIs, SLAs, Insurance, Security etc.
- All suppliers on RM3816 have Cyber Essentials Basic Accreditation.
- 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 without re-opening competition.

Customer Benefits

- Compliance with EU procurement legislation.
- Fast, Free & Simple route to market.
- Verified and vetted compliant supply chain.
- Value for Money- an average 8% saving vs RM928, which should be improved upon again at further competition.
- Quality of Service Delivery .
- Extensive customer guidance from CCS of how to use the framework.
- Working together sharing recommendations and best practise with Customers

What should 'good' look like – the 'tips'

Key criteria in an ideal world Real Estate Procurement:

- Active pre-market engagement
 - speak to your potential bidder pool
 - engage on scope
 - quality/ price matrix and take on feedback
- Streamlined tender documentation that flows and tells the story of what is trying to be achieved.
- Dedicated contact point for clarifications etc.
- Be clear on the timings for key milestones within the bid process.
- Be clear & consistent on scoring methodology, weightings and assessment.
- Limit page count per question / section- ask questions which are specific and relevant to your project requirements.
- Detailed, timely and credible feedback to successful and unsuccessful suppliers

Example of ITT Timeline

Please see a guide below to tender timelines which should be considered...

- Publication of the Further Competition Invitation- the date you publish your tender
- Clarification period starts- for any queries in relation to your tender
- Clarification period closes -Tender Clarifications Deadline
- Deadline for the publication of responses to Tender Clarification questions- for the contracting authority to answer any questions by.
- Deadline for submission of a Tender to the Authority Contract- Tender Submission Deadline
Please allow time for Potential Providers to consider your response. We recommend a minimum period of 10 working days between the Tender Clarifications Deadline and the Tender Submission Deadline.
- Date of Supplier Presentations (if required)
- Expected commencement date for the Contract

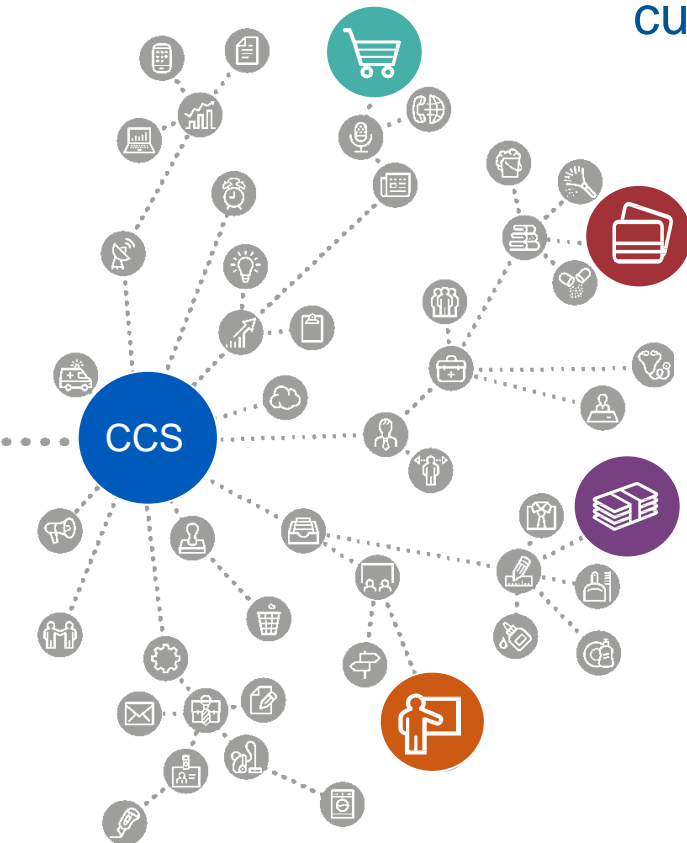
Common Challenges – the ‘trips’

- Internal stakeholder engagement and sign offs- could this add additional time?
- Timing of year for running a procurement- be aware of school half terms and major holidays.
- Do you use a portal or issue direct by e-mail- pre supplier engagement to advise how?
- Length of time for running a competition- allow adequate time for quality responses.
- Quality of information provided, its structure and clarity.
- Ensuring appropriate market interest & bid submissions are received.
- Conflicts- are there any?
- Quality/ price mix
- Feedback / relative merits assessment

Framework management

CCS can offer various levels of support to customers with call offs or framework queries

- Review and guidance of call off agreements
- Supplier management and issue escalation
- High level reporting on customer spend i.e. SMEs spend breakdown
- Query resolution and support
- Overview of all customers requirements, through access agreement process, enabling possible aggregation
- Running customer user groups enabling continuous improvement and customer surveys



Sourcing Suite Useful Links

- You can book training online via: <http://ccs.cabinetoffice.gov.uk/i-am-buyer/run-further-competition/running-further-competition/further-competition-guidance/booking>
- Link to Login page: <https://crowncommercialservice.bravosolution.co.uk/web/login.html>
- Contact the e-enablement team on e-enablement@crowncommercial.gov.uk should you have any system issues
- There are supplier webinar training sessions available online [to book onto http://ccs-forms.cabinetoffice.gov.uk/booking](http://ccs-forms.cabinetoffice.gov.uk/booking)

Going forward

If you need to discuss anything on EPS or other CCS property Frameworks please email: info@crowcommercial.gov.uk



- Sign up to our customer distribution list (for further updates on EPS other FM or property frameworks)
- Take part in a customer user group
- One-on-ones with CCS to discuss your requirement face to face or via teleconference



Questions?

Q: Can you forward details of the wording used in the ITT document that covers the call-off of services up to £50k?

A: Any service can be procured up to the value of £50k at direct award. There is additional guidance around Direct Award within the framework at Award Criteria Schedule 6- which advises what you need to consider, which is also covered within this presentation.

Q: Can you advise how the value for money figure of 8% quoted, is this a saving identified against previous pricing paid (e.g. a cash saving), based on the lowest tendered price versus the average tendered costs or is it a comparison of the lowest or average pricing charged under the Framework Agreement versus the normal pricing applied by appointed contractors in the open market (e.g. a non-cash saving)?

A: This new Framework will provide 8% savings against the previous framework and CCS will work on an ongoing basis directly with customers to identify new saving initiatives on a case by case basis. It is anticipated that savings will exceed 8% once actual spend is seen through the framework where Suppliers will be improving on their maximum rates through further competition.

Questions?

Q: In order to prevent repetition of asking questions in a further competition that have already been asked by CCS, would it be possible to have sight of either the CCS Framework questionnaire or confirm the fields / context in which these suppliers were chosen?

A: Yes, these can be sent to you on request.

Q: If we run expressions of interest and some suppliers do not confirm interest or expressly state that they are not interested, do we still need to invite them to tender?

A: Yes, this will reduce the risk of challenge and provides an audit trail for best practice.

Keeping in touch



info@crowncommercial.gov.uk



0345 410 2222



www.gov.uk/ccs



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

Crown Commercial
Service