



Crown  
Commercial  
Service

# Estates Professional Services

Framework Agreement: RM3816

Customer guidance notes and ordering procedure



Version 0.3: 12.02.20

Period of framework agreement: 22/08/2017 to 21/08/2021

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## **1. Introduction**

### **1.1 Purpose of the customer guidance and ordering procedure document.**

Crown Commercial Service (CCS) have developed this guidance to assist customers through each stage of their procurement of professional property services from the Estates Professional Services framework agreement ('Framework') awarded by CCS.

### **1.2. What is the Estates Professional Services framework agreement?**

- RM3816 replaces the previous Estates Professional Services framework agreement (RM928) held by the CCS.
- RM3816 provides customers with a 'one stop shop' solution for professional, property related services. Through the provision of services at the right cost, RM3816 enables customers to:
  - Reduce their property costs
  - Release unwanted property assets
  - Identify savings and opportunities to generate income from land and buildings
  - Adopt innovative and lean process principles
  - Deliver social value that is relevant to their needs
  - The Framework is designed to provide public sector organisations with a simplified means of sourcing services to support the delivery of a suite of property requirements and projects.

### **1.3. Who can access the Framework?**

- All UK Central Government Departments, executive agencies and non-departmental public bodies can purchase services using this framework.
- All UK departments under devolved administration across Wales, Scotland and Northern Ireland can purchase services using this framework
- This framework can also be used by other UK public sector organisations including (but not limited to):
  - Local Government
  - Health Sector (NHS)
  - Nuclear
  - Public Corporations
  - Third Sector (Charities)
  - Fire & Rescue Services
  - Police Forces
  - Further and Higher Education
  - Education Sector

For more information as to who can access this framework please refer to the contract notice:

#### 1.4. Framework duration

The Framework is for a duration of four years commencing 22nd August 2017 and (expiry is 21st August 2021).

#### 1.5. Benefits and features

- Free, fast and simple to use
- **Free:** No charge to Contracting Authorities to use the framework agreements.
- **Fast:** The Framework provides a streamlined route for all customers to access a comprehensive range of external suppliers through a further competition process or direct award. Further competition is estimated to take around 4 weeks, depending on the size and scale of the requirement.
- **Simple Call-Off Contract Terms:** Customers may use the CCS standard form found on the CCS RM3816 Webpage
- **Flexibility:** The Framework has been designed to cater for a wide range of customers. The lot structures and ability to tailor further competitions will ensure this supports customers own delivery considerations such as SME's and customer's own social value priorities.

#### Value for Money

- **Standard Rates:** Maximum standard rates are fixed for the first two years of the Framework and may be reduced by suppliers at direct award and/or further competition.
- **Savings:** The delivery of savings is embedded into the pricing models through competitive rates and continuous improvement measures. Some of the services are incentivised based on the level of savings achieved.
- **Management information:** Customers will have access to management information to track/capture
- spend based on a common set of service codes allowing in depth analysis.

#### Quality of service delivery

- **A mix of national suppliers and local expertise:** Lot 1 offers access to market leading suppliers with the capability and capacity to deliver large programmes across the UK, using in-house resources or via a supply chain network. Lot 2 offering direct access to regional suppliers with local market knowledge. Lot 3 contains suppliers delivering Vertical Real Estate services and Lot 4 for offering access to suppliers who enable managed service procurements for a suite of property solutions across the public sector

- **Social value and sustainability:**
  - Customers can request suppliers tailor their offer to match the customer's social value priorities to deliver measurable benefits in the customer's area:
    - an efficient and sustainable public estate
    - a public estate supporting diversity and inclusion
    - improved competency and capacity in the estates sector
    - tackling modern slavery in construction supply chains
- **Verified supply chain:** Suppliers and supplier sub contractors as part of the CCS evaluation stages have completed a financial and professional compliance review. In the case of sub contractors appointed after award or during the Framework life these will be evaluated by CCS to ensure financial and professional compliance prior to service delivery and during service delivery for the life of the framework.
- **Conflict of interest** clauses have been enhanced in both the Framework and Call Off terms and conditions to offer Customers greater protection where conflicts may exist especially where suppliers may be acting on behalf of a customer and landlord in a proposed same transaction.
- **Key Performance Indicators (KPIs):** A robust set of KPIs measure the supplier's' performance across the time, cost, quality triangle and be used to influence fee if required. Specific KPI measures can be determined by the customer, and can be tailored to each individual customer's specific requirements, including social value. The standard CCS call-off terms and conditions also allows the customer to define Service Credits.
- **Contract management:** CCS will actively manage performance at an enterprise level to ensure continuous improvement in the services. CCS will also drive understanding and support delivery of the Government Construction Board aims in conjunction with professional bodies.
- **Escalation route:** CCS interact with suppliers on a regular basis as part of the supplier relationship management engagement undertaken by the Strategic Category and Framework Managers. These roles facilitate an escalation route for the customer in the event of call-off queries or issues, for which a remedy is outstanding.
- **Customer User Group:** CCS will work with a dedicated Customer User Group throughout the life of the Framework to improve service delivery, share best practice, and incorporate new industry developments and regulatory requirements.

## 1.6. Contact Details

### **Crown Commercial Service:**

CCS Framework Manager: Caroline Peake

Contact Number: 0345 410 2222

E-mail: [info@crowncommercial.gov.uk](mailto:info@crowncommercial.gov.uk)

## 2. Scope

### 2.1 Lot structure

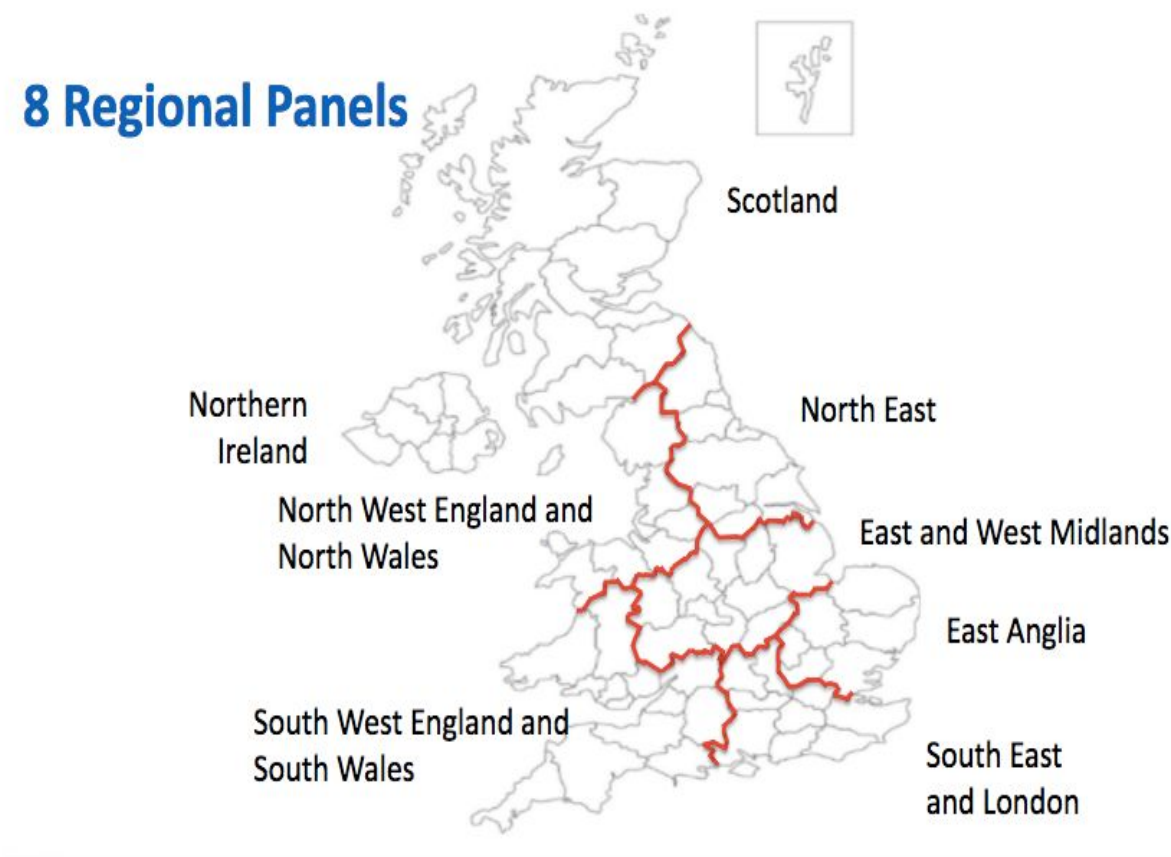
The Estates Professional Services Framework comprises of 4 lots and 8 Panels within Lot 2. These are detailed below.

Lot	DESCRIPTION	No. of Suppliers
Lot 1	National	12
Lot 2	Regional Panel 2A - East Anglia	4
	Regional Panel 2B - East & West Midlands	5
	Regional Panel 2C - London & South East England	5
	Regional Panel 2D - North East England	5
	Regional Panel 2E - North West England & North Wales	7
	Regional Panel 2F - Northern Ireland	1
	Regional Panel 2G - Scotland	3
	Regional Panel 2H - South Wales & South West England	5
Lot 3	Vertical Real Estates (VRE)	5
Lot 4	Facilities Management and Property Services (Procurement Managed Service)	5

A list of Suppliers per Lot and Panel is provided in Annex A.

2.2 Regional Panel breakdown

The map below shows how the regional panels cover the UK and which counties fall into which panel.



Panel	Counties
2A - East Anglia	Norfolk, Suffolk, Cambridgeshire, Bedfordshire, Buckinghamshire, Hertfordshire, Essex
2B- East & West Midlands	Lincolnshire, Nottinghamshire, Staffordshire, Shropshire, Derbyshire, Hereford and Worcestershire, West Midlands, Warwickshire, Leicestershire, Northamptonshire

2C - London & South East England	London, Kent, East Sussex, West Sussex, Surrey, Berkshire, Oxfordshire, Hampshire
2D - North East England	Northumberland, Newcastle Area, Durham, Teeside, Yorkshire, Humber area
Panel 2E - North West England & North Wales	Cumbria, Lancashire, Manchester, Merseyside, Cheshire, Clwyd Gwynedd
2F - Northern Ireland	Antrim, Londonderry, Tyrone, Fermanagh, Armagh, County Down
Panel 2G - Scotland	Grampian, Highland, Tayside, Central, Fife, Edinburgh, Borders, Dumfries & Galloway, Glasgow, Ayrshire and Lanark, Argyll and Bute
2H - South Wales & South West England	Dorset, Somerset, Devon, Cornwall, Gloucestershire , Bristol, Wiltshire, Gwent, Mid Glamorgan, Dyfed, Powys

### 2.3 Range of Professional Services

The services on offer from RM3816 are as follows by Lot:

**Lot 1 National** – The supplier shall deliver all mandatory services, including but not limited to professional management, workplace planning and space optimisation including but not limited to demand assessment and capacity testing; advice, guidance, negotiation and assistance on property and estates issues, on a national basis. As an optional service suppliers can provide any number of the services within this Lot at locations outside of the UK (international delivery). Please note that advice on buying services outside of the UK are contained at 3.5.1 of this guidance document.

**Lot 2 Regional Panels** – The Panels contain services that are mandatory or optional, and suppliers shall deliver services, including but not limited to professional management, advice, guidance, negotiation and assistance on property and estates issues, on a regional basis.

**Lot 3 Vertical Real Estates (VRE)** - The supplier shall deliver all applicable services, including but not limited to administration of the VRE projects, supporting the Digital Strategy, on a national basis.

**Lot 4 Facilities management and property services (Procurement Managed Services) -**



The supplier shall deliver all applicable services, on a national basis including but not limited to, full end-to-end managed procurement service, procurement strategy development, procurement and project management advice ensuring timely activity, development of customer business case; for Central Government Departments, assist with the Cabinet Office Controls Process, asset verification and condition surveys.

A high level description of services are listed below, please note **this list is not exhaustive**, further services can be called off from the EPS supply chain and will require further competition with suppliers in the relevant lot or panel:

Service	Service overview	Lot	% Fee	Hourly rate	Fixed fee
Strategic advice (including preparation and development of an estates strategy)	The supplier to provide appropriate strategic advice and/or develop a comprehensive estate strategy. Advice to include but not limited to asset management, development appraisal, investment appraisal, regeneration and market research. Supplier liaison with planning authorities and consultants to provide an integrated planning advice service.	1 & 2		✓	
Procurement strategy for property related issues	Supplier review on all aspects of the property requirement to provide advice on the procurement strategy to ensure value for money. The supplier may also provide advice on whole life investment appraisals, private funding , market trends , rental forecast, tax implications, risk transfer, residual values, development agreements, developer selection, rationalization, funding and Treasury Green Book.	1 & 2		✓	
Development consultancy and advice	Supplier to provide services ranging from the assessment of private sector demand/market interest, developing market briefs.	1 & 2		✓	
Acquisition of freehold and leasehold property	The supplier to undertake and manage a comprehensive search of available property solutions to agreeing terms and conditions of acquiring the recommended asset.	1 & 2	✓		

Building surveying services	The supplier to provide a range surveys to support pre- acquisition or existing properties, survey services to include but not limited to Planning, O&M's, M&E (Technical), environmental, RIBA (0-2), utilisation, H&S, Fire Safety, sustainability and building environments.	1 & 2		✓	
General advice on estate and property management	The supplier to provide advice on all aspects of property and housing management to support contracting authorities.	1 & 2		✓	
General estate and property management duties	The supplier to provide general estate asset management duties for the day to day operation of the commercial, retail, residential estate.	1 & 2		✓	
Disposal of freehold and leasehold property	The supplier to provide a service to support the end to end disposal of surplus land, property space or holdings that have been identified by the contracting authority.	1 & 2		✓	
Rent reviews	The supplier to provide services to achieve the satisfactory conclusion and contracting authority requirement of a rent review event.	1 & 2	✓		
Lease breaks and expiries	The supplier to provide services to achieve the satisfactory conclusion and contracting authority requirement of a Lease Break or expiry event.	1 & 2		✓	
Lease renewals	The supplier to provide services to achieve the satisfactory conclusion and contracting authority requirement of a Lease renewal.	1 & 2	✓		
Dilapidations	The supplier to provide a range of services to achieve the satisfactory conclusion and contracting authority requirement of a Dilapidation event.	1 & 2	✓		
Landlord and tenant issues including landlord consents, service charges and claims	The supplier to provide a range of services to ensure the contracting authority's position as landlord or tenant is fully protected.	1 & 2		✓	

Rating support services	The Supplier to provide professional advice, guidance, negotiation and assistance on non domestic rating issues.	1 & 2	✓		✓
Rating appeals	The supplier to provide professional advice, guidance, negotiation and assistance on non domestic rating appeals.	1 & 2	✓		
Valuations	The supplier to provide valuation services to the appropriate framework and RICS standards.	1 & 2		✓	
Planning	The supplier to provide a range of services relating to Town & Country planning advice and consultation where necessary.	1 & 2		✓	
Compulsory purchase	The supplier to provide a range of services including procedural and negotiation advice on compulsory purchasing where the contracting authority are either the purchaser or occupier.	1 & 2		✓	
Daylight, sun lighting, overshadowing and rights of light	The supplier to provide a range of services to provide advice on day lighting, sunlighting and overshadowing when a planning application is made or received by the contracting authority.	1 & 2		✓	
Party walls	The supplier to provide a range of services to advise on issuing or receiving Notices by the contracting authority.	1 & 2		✓	
Wayleaves and easements	The supplier to provide a range of services to achieve contracting authority requirements.	1 & 2		✓	
Other neighbourly matters	The supplier to provide a range of services with respect to boundary, crane and scaffold over sailing disputes.	1 & 2		✓	
Vertical real estate management (to include advertising space)	The supplier shall provide a range of services to support the Government's Digital Strategy and existing occupations where VRE is in existence.	3	✓	✓	

Facilities management & property services procurement management service	The supplier to provide a range of services for an end to end managed procurement service for the provision of Facilities Management services from the current CCS framework or future frameworks.	4	✓	✓	
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Customers are advised that the framework specification is output based, and covers all sectors, land and building type. In order to provide as much scope for suppliers to innovate in their delivery solutions, as well as not restricting customer organisations in terms of the services they wish to buy, the Framework scope of services is required to be further developed and defined for a contracting authority's further competition. Therefore the scope is not an exhaustive list of services that can be bought via RM3816, and does not necessarily name all specialisms or sub-services for a particular requirement. If required services are not listed please liaise with the Framework Manager or Suppliers to determine service delivery. This process is described further at section 3.5. If you are unsure or require confirmation please contact the CCS Framework Manager.

## 2.4 Pricing Methodology and Inclusions

The Estate Professional Services Framework facilitates the provision of services using the following pricing methodologies to provide flexibility, transparency and value for money depending on requirements:

- Hourly rate by discipline
- Percentage fee which has a minimum fee and a capped maximum fee
- Fixed fee per service
- Initial fixed fee for consultation which is then discounted from the final percentage fee

Customers shall note the following detail with regards the pricing methodology:

- The fees represent the maximum charge for the services provided by the supplier and shall be based on national office rates for property and exclude VAT at the prevailing rate.
- The fees represented in the Framework will be the maximum fee charged at call-off and suppliers shall offer discount at call-off to deliver the most economically advantageous tender or direct award at further competition.
- The charging structure allows price adjustments per lot for the type of property (industrial, retail, residential and land) and services provided to a property located in London (London is defined as any property situated within the M25 or London Orbital Motorway). For clarity the London variation will be determined on the location of the property and it is not based on the location

of the suppliers office or where their staff are based.

- A number of the pricing tables include a suppliers min and max fees. Minimum fees will apply when the % fee is lower than minimum fee and fees are capped at the maximum rate if they are exceeded by the % fee.
- The percentage fees for cells highlighted in yellow within the cost model are not cumulative across the stages and therefore the final fee percentage chargeable relates only to that stage, if a minimum or maximum rate does not apply.
- Customers shall note that the percentage adjustment for London and property type fee variations will not be applied to the minimum or maximum fee rates.
- All Estates Professional Services will be the subject of tendered fees and charges as set out within this document or on other fee arrangements based on these framework rates as agreed with the contracting authority. Contracting authority's for example, at the time of appointment on individual orders placed on general hourly rates can ask suppliers to provide a maximum lump sum bid for the work required. This lump sum will be based on the fee structure set out in this document and agreed methodologies, resources, outputs and deliverables.
- The prices in the charging structure worksheet(s) include the following:
  - a. Expenses.
  - b. The provision of technical staff and staff engaged in secretarial, accountancy, administrative or other supporting duties.
  - c. Overheads and profits, office expenses.
  - d. Postage, delivery of documents, telephone calls and similar incidentals.
- Together with main fee schedules, there will be an option for the contracting authority to apply incentivisation to the transaction-based estates services and lump sum fees covered by this framework agreement at call-off.
- Incentivisation will not apply to orders based on general or expert hourly rates. Incentivisation will involve agreement with the supplier of a target figure at the point of order, with additional percentage payments over and above the non-incentivised fee being earned by the supplier, for settlements higher or lower than the target, according to the nature of the contracting authority's interest i.e. landlord or tenant.
- Targets can be of a monetary or time related nature. In arriving at the target figure, contracting authority's may seek proposals from the supplier, obtain advice from other suppliers or run a further competition between those suppliers that the contracting authority assesses to be capable of providing the service.
- The incentivisation targets can include incremental payments and payment can be linked to failing to achieve target as well as improvement in target.

- The degree of incentivisation is left to the discretion of the contracting authority and supplier.

Example:

Target rent	£110,000
Final settlement	£100,000
Positive difference to tenant (Contracting Authority)	£10,000
Incentive fee of 10% for potential provider	£1,000

### 3. How to use this framework agreement

#### 3.1 Accessing the framework agreement

Access the Crown Commercial Service website at:

<https://www.gov.uk/government/organisations/crown-commercial-service>

Click “Find a CCS agreement”

In the search box type in “RM3816” or “Estates”

Click “Estates Professional Services”

The CCS webpage will provide customers with an overview of services, benefits, how to use, savings and documents.

Click on the Documents tab to view the OJEU Notice, Guidance Notes, ITT and Framework Schedules.

#### 3.2 Cabinet Office Spending Controls

Contracting Authorities from Central Government (including Arms Length Bodies) are required to adhere to the Cabinet Office Spending Controls when buying common goods and services. One of the categories within controls scope is consultancy. Therefore, please refer to the guidance via the attached link to find out whether your EPS procurement requires pre-approval via the controls process for consultancy.

<https://www.gov.uk/government/publications/cabinet-office-controls>

#### 3.3 Registration with CCS as a customer

Government bodies wishing to access the Framework are required to register as a customer with CCS. This can be done online via our website or by calling our Customer Service Desk

(Tel: 0345 410 2222). Our simple registration arrangements mean once a customer has registered they have access to all of our framework agreements. There is no joining fee and no commitment, even after registering.

### **3.4 Customer User Agreement and Customer Reference Number**

When placing an initial order via each lot (or panel, where this applies) within RM3816, the customer is required to complete a Customer User Agreement Form (see Annex A to this guidance) and return this to the authority at [info@crownccommercial.gov.uk](mailto:info@crownccommercial.gov.uk)

The authority will issue a Customer Reference Number on receipt of the Customer User Agreement Form. The customer should quote the Customer Reference Number supplied by the authority on all correspondence.

The supplier shall request the Customer Reference Number when a customer places a new order under the framework agreement prior to work commencing.

The supplier shall include the Customer Reference Number as part of their Management Information supplied to the authority within their MI Reporting Template.

### **3.5 Service requirements – Lot(s) selection**

Customers should first identify the Lot(s) into which their requirement best fits. It may be that your requirement spans several Lots, in which case suppliers from more than one of those lots may be able to meet your requirement.

If there are any doubts on the appropriate lot or panel to use please contact the CCS Strategic Category can assist you in identifying your needs and the contact details are included in this document.

Within the services at 4.7 Pre acquisition Property there is a service line for:

(a) RIBA Stage planning 0-2, understand the customer's core objectives, produces a number of concept designs to prove property potential, identifies budget estimates for potential alteration works that may be required;

The intention for this service is for the surveying practice to provide support to the customer for acquisition purposes. An end to end Project Management and Full Design Team Service should be procured from RM 3741. The CCS Strategic Category can provide advice on the best solution for the customer. Contact [info@crownccommercial.gov.uk](mailto:info@crownccommercial.gov.uk).

#### **3.5.1 Service requirements – international services**

Advice for customers buying international services

a) To access the optional International Service element customers should only do so as part of a call-off that includes UK requirements. For the avoidance of doubt customers should not use the optional service for "stand alone" call-off requirements e.g. single or multiple

location(s) outside the UK.

b) Customers are advised that the Call-Off Order Form and Terms and Conditions are not designed with International Services specifically in mind. Prior to commencing a further competition customers should carefully scrutinise the Call-Off Order Form and Terms and Conditions to ensure that it can be effectively used to capture and deliver their requirements.

c) Customers are advised that no qualitative testing of the Optional International Services has been undertaken.

### 3.5.2 Service requirements – Lot 4

Advice for customers buying Procurement Managed Services, the Estate Professional Services Framework and call-off Document include appropriate clauses with regards conflicts of interests. The customer shall familiarise themselves with these and 7.2 of the call off form to ensure when procuring services in particular from Lot 4.

### 3.6. Award Procedure

Customers can “call-off” from the Framework by using one of two routes:

**Further competition** – invite tenders from suppliers

**Direct award** – to invite a single supplier to submit a quotation

Both routes are available via the CCS eSourcing tool:

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

Customers can however use their own offline systems and procurement portals

Contracting authorities have the option to run an **eAuction** at further competition.

### 3.7 Call-off process – further competition

It is expected that the vast majority of work will be let via a further competition process, the benefits of such are:

- enables customer’s specific social value requirements to be addressed and incorporated as KPIs;
- enables supplementary terms and conditions to be incorporated into the call-off (to the extent permitted by the Procurement Contract Regulations 2015 <https://www.gov.uk/guidance/public-sector-procurement-policy>)
- enables suppliers to develop proposals to the Contracting Authority Scope
- enables a competitive environment for pricing and reduction on supplier's maximum framework rate



### 3.8. Further Competition Procedure

Any customer wishing to perform a further competition shall perform the following:



### 3.9. Direct award

This can be undertaken if a customer can:

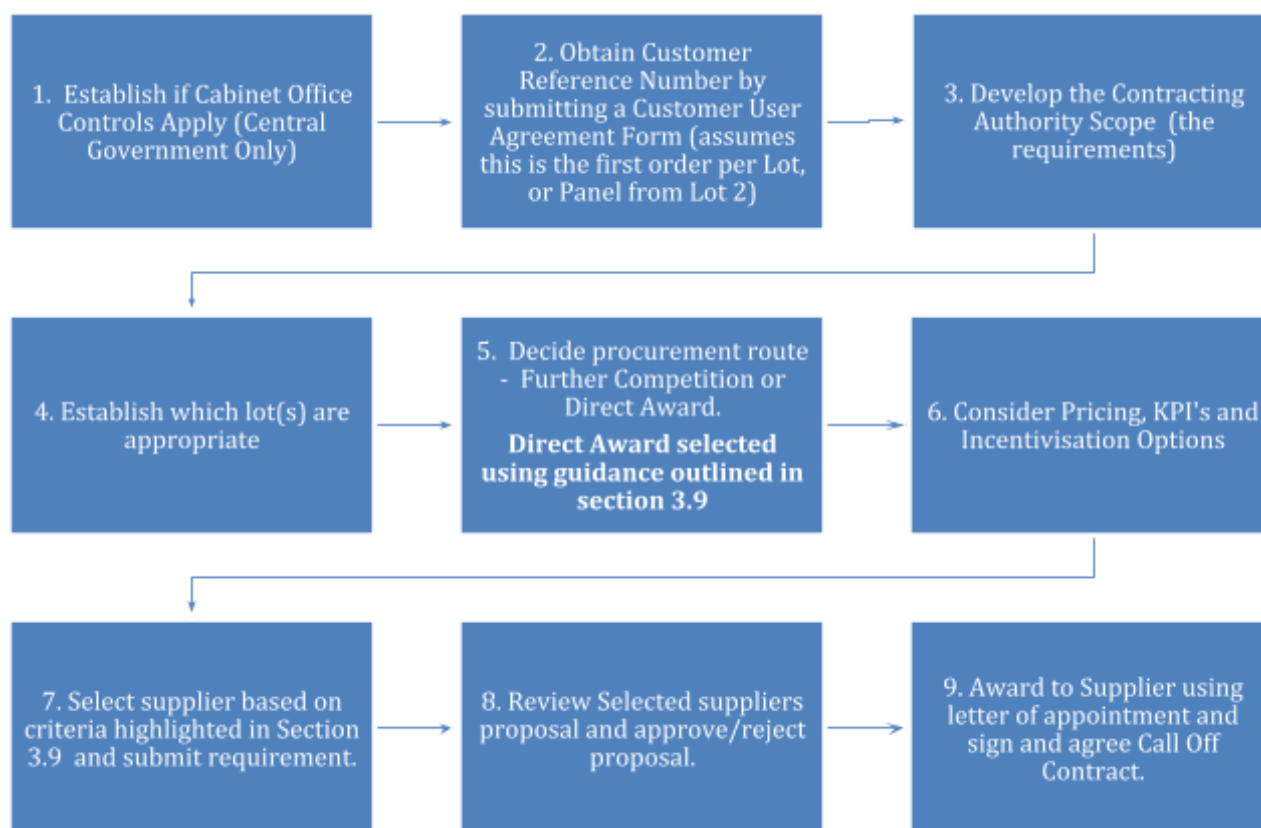
- Develop a clear Statement of Requirements;
- Ensure the estimated value of their proposed call-off contract is not greater than £50,000 plus VAT

- Apply the direct award criteria to the framework suppliers' description of the services as set out in Framework Schedule 2 (Services and Key Performance Indicators) for all suppliers capable of meeting the Statement of Requirements in order to establish which of the framework suppliers provides the most economically advantageous solution; and
- 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.

Customers are advised to request access to the supplier rates from the CCS Customer Service Desk via [info@crownccommercial.gov.uk](mailto:info@crownccommercial.gov.uk). Please include "RM3816 Rates" in the subject heading.

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

### 3.10 Direct Award Procedure



### 3.11 Buying across lots

Customers should be advised that call-offs should not be competed across Lots (i.e. Lots 1

and 2) or across the Regional Panels within Lot 2. If, however, there is market failure in a particular Regional Panel, either in terms of a failed call-off or an optional service that is not delivered by any of the 5 suppliers within the particular panel, then the suppliers from an adjoining panel or Lot 1 can be approached.

### 3.12 Pre-Tender

- Develop a Contracting Authority Scope setting out its requirements for the services, including your social value priorities, if relevant, and identify the Lot(s) most capable of supplying the Services.
- Consider running a Capability Assessment. This will allow prospective bidders to review the customer's initial requirements and consider whether they are likely to bid at further competition stage, or rule themselves out of the bidding process. The contracting authority can then potentially invite only those suppliers interested in bidding for their requirement at further competition stage.
- Consider running an E-auction to conclude your further competition as set out in 13.14.1.
- Consider your pricing strategy and how to best utilise the KPI's and incentivisation inherent in the framework.
- Complete the respective Template Call-Off form or own tender documentation pack to reflect Services Requirements, including any supplementary terms to the extent permitted by the PCR 2015, completion will include;
  - o Amend the weighting against the pre-set criteria shown below
  - o Utilise CCS standard award questions, or amend as required
  - o Select the form of agreement, inclusive of any supplementary conditions required
  - o As the weighting set in order to get on the framework at the initial stage was 55:45 in favour of cost, it is recommended not to have the weighting set too high in favour of cost as it may put off potential bids from suppliers.

Evaluation Criteria	Criteria Weighting %	Sub-Criteria	Sub Criteria Weighting %
Quality	10-90%	To be determined by the customer e.g. approach to solution, resourcing, mobilisation	To be determined by the customer
Price	10-90%	Percentage Project Fees Time Charge Fees	To be determined by the customer

### 3.13 Tender and evaluation phase

Invite tenders by conducting a further competition by:

- utilising the template call off form (if required)
- inviting (electronically) the framework suppliers for the chosen lot to submit a tender. This shall be addressed to the supplier representative

- set a time limit for the receipt of tenders taking into account the size and complexity of the services
- assess bids in a fair and transparent manner through application of the further competition award Criteria
- provide unsuccessful framework suppliers with written feedback in relation to the reasons why their tenders were unsuccessful.

### **3.14 Contract award**

- The call-off can be completed by completing the order form incorporated within the further competition pro-forma. This shall include the following key elements:
  - o Contracting Authority Scope
  - o Supplier Payment Proposal this being a report that sets out the suppliers
    - detailed understanding of the Contracting Authority Scope
    - proposed approach to the task
    - sub-consultants and how they will be managed
    - resource plan inclusive of key persons CV's
    - fee proposal including discounts applicable to the maximum rates.
- Should circumstances change or responses are inadequate nothing in the framework agreement obliges Customers to make award. However, where a no award decision is made due to poor responses from suppliers CCS would appreciate feedback.
- There is the facility to sign underhand, or by deed should customers require this option.

**3.14.1** The Contracting Authority is reminded that whilst utilising the framework to source services, consideration and compliance with their own internal processes and governance procedures should be adhered to.

### **3.15 The supplier's obligations**

The supplier shall in writing, by the time and date specified by the contracting authority following an invitation to tender, provide the contracting authority with either:

- a statement to the effect that it does not wish to tender or;
- a completed further competition pro-forma; including the provision of the following
  - o Responses to award questions raised by the customer
  - o Tender certificate inclusive of a statement of non-collusion and confidentiality requirements
  - o Supplier Payment Proposal (SPP) which is a report setting out
    - detailed understanding of the Contracting Authority Scope
    - proposed approach to the task
    - sub-consultants and how they will be managed
    - resource plan inclusive of key persons CV's
    - fee proposal including discounts applicable to the maximum rates in line with the charging structure.

### **3.16 Responsibility for awards**

Each contracting authority is independently responsible for the conduct of its award of call-off

contracts under this framework agreement. CCS is not responsible or accountable for and shall have no liability whatsoever in relation to:

- (a) The conduct of other contracting authorities in relation to this framework agreement; or
- (b) The performance or non-performance of any call-off contracts between the supplier and other contracting authorities entered into pursuant to this framework agreement.

### **3.17 CCS Support to placing a call-off contract via a further competition process**

A comprehensive 'User Guidance for Customers: Self-Service' document with a suite of associated templates has been published on the Crown Commercial Service eSourcing Tool and available for customers to use where such customers are running their own further competitions on a self-service basis.

#### **3.17.1 Crown Commercial Service eSourcing Tool**

- CCS offers a free to use further competition tool via the eSourcing Tool which will help to facilitate customers' further competition processes.
- The eSourcing Tool enables customers to send information to suppliers and obtain a quotation based on their requirements. *Customers are reminded that they must invite all capable suppliers to quote for their requirements.*
- Customers have the ability to upload documents to suppliers so that they can submit a tender for the services.
- If you do not already have a login for the eSourcing Tool you can register here:

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

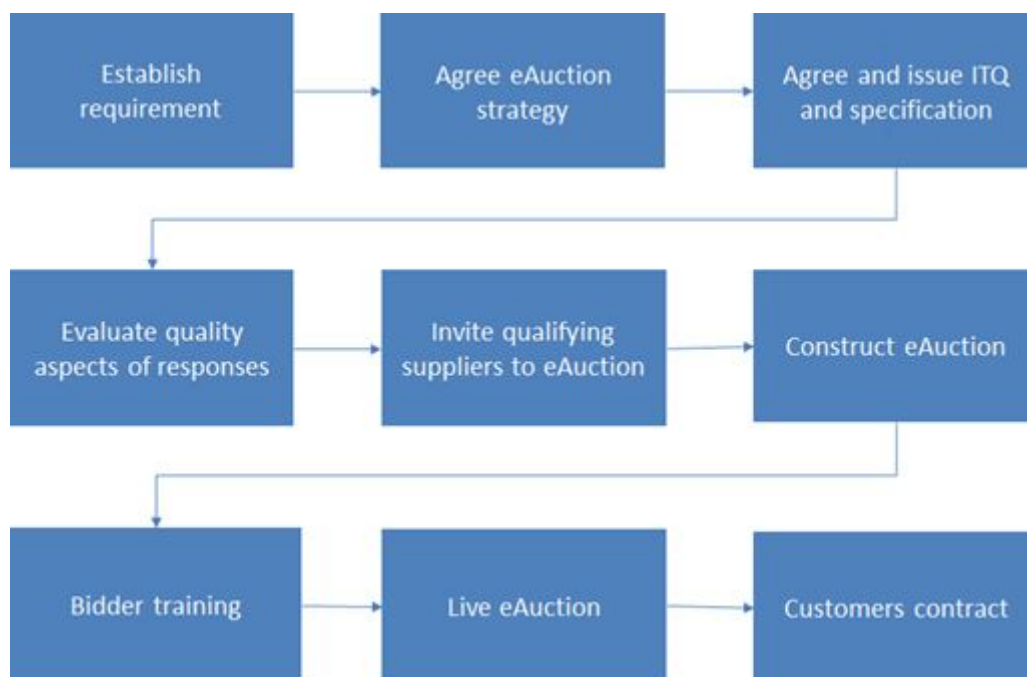
Contact CCS should you need further support in developing your approach for social value, including evaluation strategies.

### **3.18 eAuctions**

- eAuctions can be used to conclude your further competition as an alternative to a traditional price evaluation. They can be based on price alone or a combination of price and quality.
- Crown Commercial Service eAuctions are fully managed with CCS, with a dedicated and experienced eAuction delivery team and expert category advice to help you along the way.
- The eAuction programme works to maximise commercial advantages and increase the opportunity for savings using a well proven procurement technique based on secure internet-based technology, which can deliver cashable cost reductions quickly, whilst protecting quality and service levels.

You are invited to contact our eAuction team to discuss your specific needs so that they can

advise on whether your procurement is suitable for eAuction and work with you to agree a plan that meets your requirements and timescales. The below process sets out using the e-auctions team



### **3.19 Customer satisfaction**

The customer satisfaction survey will be developed in conjunction with the user group.

### **3.20 User group meetings**

Terms of Reference have been drafted for the establishment of a Estate Professional Services User group please refer to Annex C for further details of the roles, frequencies, inputs and outputs.

## **4. Charging arrangements**

If placing an order by direct award the rates contained within the corresponding suppliers price schedule shall be used.

### **4.1 Payment Profiles**

Where the customer requires that a non-standard or bespoke payment profile will be necessary for the duration of any contract, the details should be set out in the order in the form of a supplementary term.

### **4.2 Rate Reviews**

The earliest date for inflationary increases to the framework prices will be the xxxxxx 2019. Any subsequent increase to the framework prices shall be annually after this date.

Throughout the contracting term CCS will actively seek rate reductions with service providers to drive additional value for money savings.

#### **4.3 Audit**

As part of its contract management function, CCS has the right to conduct independent auditing of the supplier's processes, procedures and application of their daily rates. Customers should contact CCS if they believe that any particular supplier should be audited.

### **5. Terms and Conditions**

- The form of contract is the standard CCS call-off contract terms and conditions.
- Pricing is to be based on customer requirements.

### **6. Key Performance Indicators**

The Framework and call-off document provide a standard set of KPI's to allow for the capture of MI by the supplier to be fed into CCS. The KPI's may be further developed at call-off with the supplier to achieve customer service requirements.

## **Annex A - Suppliers per Lot**

<b>List of successful Suppliers in alphabetical order by Lot.</b>
<b>Lot 1 National</b>
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
<b>Lot 2: Regional Panel 2A East Anglia</b>
Copping Joyce Surveyors



Essentia Trading Limited
NPS Property Consultants Limited
Savills (UK) Limited
<b>Lot 2: Regional Panel 2B East and West Midlands</b>
Savills (UK) Limited
E3 Cube
Bruton Knowles
Valuation Office Agency
Fisher German LLP
<b>Lot 2: Regional Panel 2C London and the South East</b>
Amey OW Limited
Essentia Trading Limited
Fisher German LLP
Jones Lang LaSalle Limited
Knight Frank LLP
<b>Lot 2: Regional Panel 2D North East England</b>
Bruton Knowles
Knight Frank LLP
NPS Property Consultants Limited

Valuation Office Agency
WYG Management Services Ltd
<b>Lot 2: Regional Panel 2E North West England &amp; North Wales</b>
Amey OW Limited
Fisher German LLP
Jacobs U.K. Ltd
Jones Lang LaSalle Limited
Knight Frank LLP
Valuation Office Agency
WYG Management Services Ltd
<b>Lot 2: Regional Panel 2F Northern Ireland</b>
Lisney NI Ltd
<b>Lot 2: Regional Panel 2G Scotland</b>
FG Burnett Limited
J&E Shepherd Chartered Surveyors
Ryden LLP
<b>Lot 2: Regional Panel 2H Wales and South West:</b>
Alder King
Bruton Knowles

NPS Property Consultants Limited
Jones Lang LaSalle Limited
Savills (UK) Limited
<b>Lot 3: Vertical Real Estate</b>
Lambert Smith Hampton Group Ltd
Savills (UK) Limited
Fisher German LLP
Knight Frank LLP
David R Boyne property solutions Limited
<b>Lot 4: Facilities Management and Property Services (Procurement Managed Service)</b>
Arcadis LLP
Capita Business Services Ltd
Long O Donnell Associates Limited
WT Partnership Limited
WYG Engineering Limited

All suppliers have been appointed onto our framework agreement following the successful completion of a rigorous EU compliant open tendering exercise.

As the Valuation Office Agency/DVS is an Agency of a Central Government Department and therefore unable to enter into contract with other Central Government Departments and / or Agencies, a Memorandum of Understanding has been established which confirms that both parties will agree to abide by the terms of the unsigned draft call-off contract as if it represented a binding contract between them. Customers using the framework agreement

from the Wider Public Sector will continue to use the call-off contract as standard.



### **Estates Professional Services Framework RM3816**

#### **Customer User Agreement Form**

The Estates Professional Services agreement is available to all central government departments and wider public sector organisations and provides access to professional property related services to reduce property costs, release unwanted property assets, identify savings and identify opportunities to generate income from land and buildings.

Prior to placing your order, the following information should be completed and provided to Crown Commercial Service prior to any call off of services through this agreement.

Please complete the following information and return this to: [property@crowncommercial.gov.uk](mailto: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	<b>EPS-0000-2017</b>
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\*to be completed by Crown Commercial Service

## Annex C

# Estates Professional Services

Framework Agreement: RM3816

User Group Terms of Reference

Version: Draft

## 1. Background and context

RM3816 the Estates Professional Services Framework was awarded on 22nd August 2017.

RM3816 replaces the previous Estates Professional Services Framework Agreement (RM928) held by Crown Commercial Service.

RM3816 provides customers with a 'one stop shop' solution for professional, property related services. Through the provision of services at the right cost, RM3816 enables customers to:

- Reduce their property costs
- Release unwanted property assets
- Identify savings and opportunities to generate income from land and buildings.
- Adopt innovative and lean process principles
- Deliver social value that is relevant to their needs

The Framework is designed to provide public sector organisations with a simplified means of sourcing services to support the delivery of a suite of property requirements and projects. The Framework is structured into 4 lots with the following Suppliers being able to provide a full range of estate professional services.

The Estates Professional Services User Group has been established to promote and support the framework by Central Government and Wider Public Sector Users through regular structured meetings chaired by CCS and attended by a range of customers.

## **1. Roles and functions of the Estates Professional Service User Group**

The Estates Professional Services User Group will:

- Openly share customer experiences in the call off by direct award or further competition of the EPS Framework to develop continuous improvement
- Openly share customer experiences in the receipt of EPS Framework services to develop continuous improvement
- Identify common practises and processes in the use of the EPS Framework to develop a standardised service delivery across the framework suppliers
- To provide constructive feedback on the EPS Framework, supply chain and the role of CCS
- Identify risks and issues in the delivery of EPS through the framework supply chain
- Constructively participate in the review of supplier performance against MI returns (CCS to develop dashboard/report)
- Review supplier's business continuity, mobilisation, delivery, exit plans, (full list to be identified), that are published as part of the suppliers framework documents
- Provide customer input into improving and enhancing future EPS frameworks

## **2. Role of individual group members**

The role of the individual members of the Estates Professional Services Group includes:

- attending regular meetings as required ({x} per year) and actively participating in the group's work.
- representing the interests of all {insert organisation name} employees, as appropriate
- a genuine interest in the initiatives and the outcomes being pursued in the framework

## **3. General**

#### **4. Membership**

The Estates Professional Services Group shall be comprised of:

- Janine Nutall (CCS EPS Framework Manager)
- Matthew Davies (CCS EPS Category Manager)
- {list names of group members, including their titles, if necessary}

Other members may be included in the group as required. On an ad hoc basis, with agreement of the User Group, suppliers will be invited to the group to provide presentations on current, future or emerging market practise, conditions, changes or trends as part of their role in upskilling their clients.

##### **4.1. Chair/Convenor**

The group will be chaired by {insert name/title of Group Chair}. Meetings will be convened by the Chair and supported by the Coordinator {insert name/title of Group Coordinator}.

##### **4.2. Agenda items**

All agenda items will be forwarded to the Coordinator by close of business ten working days {adjust as appropriate} prior to the next scheduled meeting. The standard agenda shall include the following items as a minimum:

- Introductions
- Agreement of previous minutes
- Review of actions from last meeting
- Current positions and issues
- Market review and outlook
- Supplier review
- Risk management
- AOB

The agenda, with attached meeting papers, will be distributed at least five working days {adjust as appropriate} prior to the next scheduled meeting.

##### **4.3. Minutes and meeting papers**

The minutes of each Estates Professional Services User Group meeting will be prepared by {insert name here}.

Full copies of the minutes, including attachments, will be provided to all Estates Professional Services Group members no later than ten working days {adjust as appropriate} following each meeting.

By agreement of the group, out-of-session decisions will be deemed acceptable. Where agreed, all out-of-session decisions will be recorded in the minutes of the next scheduled meeting {delete or adjust as appropriate}.

#### **4.4. Frequency of meetings**

The Estates Professional Services User Group will meet {insert agreed frequency}.

#### **4.6 Location of Meetings**

The Estate Professional Services User Group will meet at different CCS and customer locations, these will be agreed during the initial formation of the User Group.

Members of the User Group will not be paid for attendance by CCS and no travelling expenses will be paid by CCS.

#### **4.5. Proxies to meetings**

Members of the Estates Professional Services User Group will nominate a proxy to attend a meeting if the member is unable to attend.

The Chair will be informed of the substitution at least five working days {adjust as appropriate} prior to the scheduled nominated meeting.

The nominated proxy will provide relevant comments/feedback about the attended meeting to the Estates Professional Services User Group member they are representing.

#### **4.6. Review**

The effectiveness and membership of the Estates Professional Services User Group will be reviewed after {x} months.



