



User guide



Framework 2700 Issue 23

Estate Management Consultancy Services



Framework Period:
13 January 2015 to 12 January 2019





CONTENTS

1.	Overview of Framework	Page 3
2.	Services Available: - Description of Individual Lots / Packages	Page 5
3.	Supplier Information: - Supplier Contact Details - Service Coverage - Geographical Coverage	Page 8
4.	Pricing Information	Page 16
5.	How to Place an Order	Page 17
6.	Managing the Framework	Page 19
7.	Background to the Procurement: - How ESPO Established the Framework - Evaluation Scheme - Framework Documentation - Period of the Framework & Right to Extend - Contractual Structure	Page 20
8.	Appendices 1. Customer Access Agreement 2. Call-Off Order Form (see separate document) 3. Confirmation of Award Form 4. Terms of Agreement (see separate document) 5. Supplier Geographical Coverage (see separate document)	Page 22

Issue No. 23 – 24 July 2017

- The supplier 'BNP Paribas Real Estate' contact details have been updated.

A revised Issue number is allocated to the User Guide each time supplier information is updated or an amendment is made to the User Guide. Please visit our website www.espo.org to ensure you have the latest Issue number.



Quick start guide



Framework 2700 Issue 23

Key facts...

Framework ref: 2700/15

Start date: 13/01/2015

End date: 12/01/2019

Extension option:
Up to 12/01/2019

OJEU contract notice:
2014/S 081-141504

OJEU award notice:
2015/S 027-045764



This framework
is available for
use nationally



ESTATE MANAGEMENT CONSULTANCY SERVICES

Framework scope

This framework offers a range of estate management consultancy services relating to the use, management, acquisition, disposal and development of land and property. All suppliers of the framework have been selected for their experience and ability to provide customers with a comprehensive service.

To reflect the different types of estate management consultancy services required by the public sector, the framework is divided into the following lots:

- Fixed Asset Valuation
- Rating Valuation
- General Valuation
- Commercial Agency
- Agricultural Agency
- Lease Management – Commercial (L&T)
- Lease Management – Agricultural (L&T)
- Lease Management – Agricultural (Estate/Farm Buildings)
- Property/Estate Management
- Strategic Asset Management including Development Consultancy – Urban
- Strategic Asset Management including Development Consultancy – Rural
- Planning Consultancy
- Compulsory Purchase and Compensation

This page is intended to provide you with an overview of what is available. Please refer to the full User Guide for more information.

Who can use this Framework?

The framework is available for use nationally by any public sector body in the UK including, but not limited to...

- Schools & Academies
- Local Authority Establishments
- Police & Emergency Services
- NHS & HSC Bodies
- Central Government Departments & their agencies
- Registered Charities and Registered Social Landlords

Full details of end user establishments and their geographical areas are available on <http://www.espo.org/ojeu-framework-permissible-users>.

Benefits of using this Framework

- The framework has been established by local government customers, with their building and land portfolios in mind.
- The framework is divided into a range of consultancy disciplines to ensure that specialist and knowledgeable suppliers are included as well as niche SMEs.
- This framework is compliant with UK/EU procurement legislation - we've done the work, so there's no need for you to run a full EU procurement process.
- Suppliers listed on the framework were assessed during the procurement process for their financial stability, track record, experience and technical & professional ability.
- What you see is what you pay – there are no additional charges.
- Pre-agreed terms & conditions to underpin all orders so there is no need to worry about what terms and conditions to use.

Further Help or Questions?

Chloe Muir

0116 294 4072

resources@espo.org

Quote reference

ESPO framework 2700/15

We would like to hear your feedback on this framework and how you think we could improve it in the future.



What else can ESPO help you with?

This is one of over 200 frameworks that ESPO has established. If you have found this one useful then here are some examples of others that may be of interest:

- **343 – Energy Performance of Buildings – Surveying, Assessment & Certification**
- **664 – Consultancy Services**
- **2664 – Property Advice and Management Services**

Full details of our framework offer are available on the ESPO website www.espo.org

You will also find a range of products in the ESPO Catalogue which is available as either hard copy or via our website www.espocatalogue.org

ESPO can also undertake bespoke procurement exercises on your behalf. Please contact us to discuss your requirements.

Further Help or Questions?

Chloe Muir
0116 294 4072
resources@espo.org

Quote reference

ESPO framework 2700/15

We would like to hear your feedback on this framework and how you think we could improve it in the future.

Suppliers

This framework provides the user with a large number of suppliers to choose from and a full list with the contact details can be found in Section 3 of the full User Guide.

How to use this Framework

Step 1 - Complete the Customer Access Agreement ([Appendix 1](#) of the User Guide) and return it to ESPO.

Step 2 - Review the User Guide to establish whether your needs can be met by a single supplier or whether you need to conduct a further competition. Section 5 contains more information on how to place an order. Typically smaller, more straightforward requirements can be met by one supplier, larger, more complex requirements will require a further competition to achieve the best supply solution.

If you decide that a single supplier can meet your requirements based on the pricing and/or other information provided simply place an order with that supplier. A template order form is available for you to use at [Appendix 2](#) of the User Guide.

If you decide you need to conduct a further competition you may do so by seeking quotations from **all** of the suppliers that are able to meet your requirements in your particular location. More specific details on how to conduct a further competition can be found in Section 5 of the User Guide.

Please quote ESPO framework reference 2700/15 on all correspondence.

About ESPO and our frameworks

ESPO is a local authority owned purchasing and supply consortium. It is jointly owned by the county councils of Cambridgeshire, Leicestershire, Warwickshire, Lincolnshire and Norfolk and city council of Peterborough.

We have over 30 years of experience in public sector procurement. All of our frameworks are let in full compliance with UK procurement regulations (and the EU procurement directive).

ESPO is a not for profit, self-funded organisation. ESPO recovers its overheads by means of a retrospective rebate from the suppliers. The rebate levied averages less than 1% of framework turnover.

ESPO's specialist buying teams have extensive experience of providing high quality procurement solutions to the public sector on a nationwide basis.

At ESPO we use our expertise to work with our strong and varied supply chain to bring you the best value procurement solutions possible.

2. Services Available via this Framework

The framework is essentially a select list of suppliers, all with a proven and successful track record of delivering estates management consultancy services, from whom customers may set up supply arrangements quickly and simply.

To reflect the different types of estate management consultancy services required by the public sector, the framework is divided into the below lots.

1. Valuation Services

This is split into three sub-lots;

1a Fixed Asset Valuation

1b Rating Valuation

1c General Valuation

The valuation services covered by the framework comprise the full range of services under the Royal Institution of Chartered Surveyors Valuation faculty. The types of valuations covered include:

- Market value, fair value, worth (investment value).
- Valuation for public sector asset financial reporting.
- Insurance replacement costs.
- Ratings including appeals.
- Development and market appraisals.
- Tenant rights, including right to buy.
- Individual valuations for any other purpose.

2. Commercial and Agricultural Agency

This is split into two sub-lots;

2a Commercial Agency

2b Agricultural Agency

The agency services covered by the framework comprise acquisition and disposal of an interest in land on the open market. Acquisitions in this area of activity are not required using customers' Compulsory Purchase powers. Suppliers can provide advice in respect of commercial, residential and agricultural property and land. Strategic investment advice can be provided in relation to market conditions and availability of a wide range of property. The letting agency services also comprise acquisition and disposal of leases in respect of a wide range of commercial and agricultural property. Advice on letting strategies is also covered.

3. Lease Management

This is split into three sub-lots;

3a Lease Management Commercial (L&T)

3b Lease Management Agricultural (L&T)

3c Lease Management Agricultural (Estate and Farm Buildings)

The lease management services covered under the framework comprises advice on interim and market rents and negotiation of lease renewals and rent reviews, general advice on lease terms, strategy for service of notices and mediation and settlement of interim and terminal schedules of dilapidation. Suppliers can also provide expert witness and arbitration services.

4. Property/Estate Management

A broad range of estate management services are covered under the framework, including:

- Day to day management of leased properties, including dealing with maintenance and repair issues, liaison with tenants, preparation of budgets, negotiation and documentation of tenancy agreements, advice on maximising revenue and review of rents.
- Negotiation and documentation of casual licences and hirings.
- Advice on and carrying out of rent collection (if required) and disputes with tenants and landlords.
- Negotiation and completion of tenancies at will.
- Dealing with repossessions and evictions.
- Advice on trespass issues.
- Negotiation and settlement of boundary disputes.
- Dealing with public, member and tenant complaints.
- General estate management advice.
- Carrying out measured surveys in accordance with the RICS code of Measuring Practice.
- Condition surveys with recommendation for requisite repairs and budget costs, including historic and listed buildings, preparation of specifications for work, obtaining quotations and supervision of works.
- Advice on and administration of service charges for managed properties.
- Providing regular customer reports where applicable covering:
 - Prompts of key lease milestone dates such as rent reviews, lease renewals, decoration, break options etc.
 - Reporting on tenant related issues.
 - Budget and forecasting for managed properties.
 - Progress on individual projects.
 - Day to day management of property not occupied by the customer (surplus) which may be tenanted or vacant, including dealing with maintenance and repair issues, liaison with tenants, maximisation of rent and dealing with security issues.

5. Strategic Asset Management and Development Consultancy

This is split into two sub-lots;

5a. Strategic Asset Management and Development Consultancy - Urban

5b. Strategic Asset Management and Development Consultancy - Rural

These lots cover services relating to the maximisation of value of individual and groups of properties, encompassing:

- Review of property strategy.
- Efficient use of accommodation.
- Maximisation of income.
- Land assembly and joint venture sales.
- Potential for maximising capital receipts.
- Minimising revenue expenditure.
- Advice on the use of different funding methods, i.e. Prudential borrowing, PFI schemes, for the development of complex multi-agency facilities.

6. Planning Consultancy

This lot comprises services covering the following:

- Obtaining planning approvals, including appeals.
- Planning history reports.
- Planning feasibility.
- Enforcement.
- Assessment of land use options.
- Preparation of development brief for informal Local Planning Authority Agreement.
- Stakeholder consultation.
- Monitoring consultations and attending committees.
- LDF's representation and monitoring.
- Pursuing representations at inquiry stage.
- Reviewing proposed modifications/adoption proceedings.
- Advice and negotiation of Section 106 and Grampian conditions, including developer contributions.
- Master Planning.
- Environment Assessments.

Other services that may be required as part of the above may also include;

- Flood risk assessments.
- Transport consultancy including transport assessments and highways access.
- Topography and tree surveys.
- Noise and sound sensitivity.
- Contamination.
- Air quality testing.
- Ecology.
- Site and ground surveys.
- Advice on strategic tree planting (location).

7. Compulsory Purchase and Compensation

This lot covers advice on all aspects of compensation claims including land referencing, preliminary advice on the cost benefit of potential schemes, sale and purchase under CPO powers or threat of CPO, claims under Part 1 of the Land Compensation Act 1973. Negotiation and settlement of easements and wayleave agreements are also included.

Work outside the Scope of this Framework

Please note that the following work areas are **not included within the scope of the framework**:

- Residential agency.
- Archaeology assessments.
- Structural surveys.
- Auctions.

3. Supplier Information

Supplier Contact Details

The names and contact details for the framework suppliers feature below, alongside the awarded suppliers under each lot. The geographical coverage of each supplier is available to download from our website www.espo.org or upon request via email to resources@espo.org. Suppliers are listed in alphabetical order and are not ranked in any way. When communicating with suppliers please refer to ESPO framework 2700/15 in all correspondence.

Pricing information is shown in Section 4.

Supplier	Contact Details
Amec Foster Wheeler Environment & Infrastructure Ltd Gables House Kenilworth Road Leamington Spa CV32 6JX	Contact: Helena Deaville Tel: 01926 439095 Email: helena.deaville@amecfw.com Web: amecfw.com
APB (Leicester) Ltd 13 De Montfort Street Leicester LE1 7GE	Contact: Will Shattock Tel: 01162 540382 Email: wjs@apbleicester.co.uk Web: www.apbleicester.co.uk
Ardent Management Ltd Level 33 25 Canada Square London E14 5LQ	Contact: Charlotte Maynard Tel: 07786 965139 Email: charlottomaynard@ardent-management.com Web: www.ardent-management.com
ATKINS Ltd The Axis 6 th West 10 Holliday Street Birmingham B1 1TF	Contact: Jacqueline Sheppard Tel: 01214 835820 Email: jacky.sheppard@atkinsglobal.com Web: www.atkinsglobal.com
Barford & Co Howard House 17 Church Street St Neots Cambridgeshire PE19 2BU	Contact: Sheila Ann Smyth Tel: 01480 213811 Email: ssmyth@barfords.co.uk Web: www.barfords.co.uk
Berrys 3 Cherry Hall Road Kettering Northants NN14 1UE	Contact: Christopher Noble Tel: 01536 517777 Email: chris.noble@berrybros.com Web: www.berrybros.com
Bidwells LLP Bidwell House Trumpington Road Cambridge CB2 9LD	Contact: Jeremy Procter Tel: 01223 559592 Email: jeremy.procter@bidwells.co.uk Web: www.bidwells.co.uk
BNP Paribas Real Estate Advisory & Property Management UK Ltd 9 Colmore Row Birmingham B3 2BJ	Contact: Michael Harkin Tel: 07785 516 572 Email: michael.harkin@realestate.bnpparibas Web: www.realestate.bnpparibas.co.uk

Bruton Knowles Bisley House Green Farm Business Park Bristol Road Gloucester GL2 4LY	Contact: Philip Cowen/ Claire Card Tel: 01452 880000 / 01452 880044 Email: philip.cowen@brutonknowles.co.uk/claire.card@brutonknowles.co.uk Web: www.bرتونknowles.co.uk
BSMH Ltd t/a Barker Storey Matthews 37 Priestgate Peterborough Cambridgeshire PE1 1JL	Contact: Martin Hughes Tel: 01733 556490 Email: mh@bsm.uk.com Web: www.bsm.uk.com
Carter Jonas LLP 9a Jewry Street Winchester Hampshire SO23 8RZ	Contact: Melissa Beale/ Julie Miller Tel: 01865 404469 Email: Melissa.Beale@carterjonas.co.uk / Julie.miller@carterjonas.co.uk Web: www.carterjonas.co.uk
Cushman & Wakefield 125 Old Broad Street London EC2N 2BQ	Contact: Matthew Cliff / Emma Bainbridge Tel: 01132 337384 / 01132 337367 Email: matthew.cliff@cushwake.com / emma.bainbridge@cushwake.com Web: www.cushmanwakefield.co.uk
DVS/ Valuation Office Agency Wingate House 93/107 Shaftesbury Avenue London W1D 5BU	Contact: Rory O'Boyle Tel: 03000 503406 / 07795 367314 Email: rory.oboyle@voa.gsi.gov.uk Web: www.gov.uk/government/organisations/valuation-office-agency
Fisher German LLP 40 High Street Market Harborough Leicester LE16 7NX	Contact: Matthew Pocock Tel: 01858 411208 Email: Matthew.Pocock@fishergerman.co.uk Web: www.fishergerman.co.uk
Gerald Eve LLP 72 Welbeck Street London W1G 0AY	Contact: Richard Moir Tel: 02073 336281 Email: rmoir@geraldev.com Web: www.geraldev.com
GL Hearn 20 Soho Square London W1D 3QW	Contact: Jon Pinkerton (Lot 5a) / Richard Williamson (Lot 1a) Tel: 02078 513726 / 01242 303149 Email: jon.pinkerton@glhearn.com / richard.williamson@glhearn.com Web: www.glhearn.com
Gleeds Advisory Ltd Wilford House 1 Clifton Lane Wilford Nottingham NG11 7AT	Contact: Michael Davies Tel: 01159 778000 Email: michael.davies@gleeds.co.uk Web: www.gleeds.com
GVA Grimley Ltd 65 Gresham Street London EC2V 7NQ	Contact: Ben Ransom Tel: 0121 609 8440 Email: ben.ransom@gva.co.uk Web: www.gva.co.uk

King West Ltd t/a King West/John Martin Associates 10 Church Square Market Harborough Leicestershire LE16 7NB	Contact: Jackie Jackson Tel: 01858 435975 Email: jjackson@kingwest.co.uk Web: www.kingwest.co.uk
Lambert Smith Hampton Group Ltd UK House 180 Oxford Street London W1D 1NN	Contact: Sophie Goodfellow Tel: 02071 982341 Email: publicsector@lsh.co.uk Web: www.lsh.co.uk
Mather Jamie 3 Bank Court Weldon Road Loughborough LE11 5RF	Contact: Robert Cole / Gary Kirk Tel: 01509 233433 Email: robert.cole@matherjamie.co.uk / gary.kirk@matherjamie.co.uk Web: www.matherjamie.co.uk
Montagu Evans LLP 5 Bolton Street London W1J 8BA	Contact: Graham Copeland Tel: 02073 127462 Email: graham.copeland@montagu-evans.co.uk Web: www.montagu-evans.co.uk
NPS Property Consultants Ltd Lancaster House 16 Central Avenue St Andrews Business Park Norwich NR7 0HR	Contact: Liz MacDonald / Melvyn Stone Tel: 01603 706064 Email: bids@nps.co.uk / liz.macdonald@nps.co.uk / melvyn.stone@nps.co.uk Web: www.nps.co.uk
Peter Brett Associates LLP 61 Oxford Street Manchester M1 6EQ	Contact: Tim Coleby Tel: (Mob) 07885 999744 Email: tcoleby@peterbrett.com Web: www.peterbrett.com
RPS Consulting Services Limited 20 Western Avenue Milton Park Abingdon Oxfordshire OX14 4SH	Contact: Ellie Richens Tel: 0121 213 5500 Email: bidteam@rpsgroup.com Web: www.rpsgroup.com
Savills (UK) Ltd 33 Margaret Street London W1G 0JD	Contact: Alex Dawson / Jacqui Gee Tel: 02070 163826 / 02072 993084 Email: adawson@savills.com / jgee@savills.com Web: www.savills.co.uk
Strutt & Parker LLP 5 South View Tinwell Road Stamford Lincolnshire PE9 2JL	Contact: Lauren Gibson-Green Tel: 01223 459492 Email: lauren.gibson.green@struttandparker.com Web: www.struttandparker.com
TerraQuest Solutions Ltd 10 Clement Street Birmingham B1 2SL	Contact: Craig Harper Tel: 01212 341300 Email: craig.harper@terraquest.co.uk Web: www.terraquest.co.uk

The Environment Partnership (TEP) Ltd Genesis Centre Birchwood Science Park Warrington Cheshire WA3 7BH	Contact: David Walton Tel: 01925 844048 Email: DavidWalton@tep.uk.com Web: www.tep.uk.com
Whybrow & Dodds Ltd 2 De Grey Square De Grey Road Colchester Essex CO4 5YQ	Contact: Coralie Douglas (Lot 5a) / Andrew McLeod (Lot 1c) Tel: 01206 577667 Email: coralie.douglas@whybrow.net / andrew.mcleod@whybrow.net Web: www.whybrow.net
Wilks Head & Eve LLP 6 th Floor Fairgate House 78 New Oxford Street London WC1A 1HB	Contact: Jackie Oakes Tel: 020 7637 8471 Email: joakes@wilks-head.co.uk Web: www.wilks-head.co.uk

Service Coverage

The following tables illustrate the suppliers included on the framework (in alphabetical order, they are not ranked in any way) and the services they are able to provide. Please ensure that you refer to [Appendix 5](#), which details the geographical coverage of all organisations awarded on the framework, to ensure that the suppliers are able to service your geographical area.

Lot 1a Fixed Asset Valuation

Organisation
Bruton Knowles
Carter Jonas LLP
DVS Valuation Office Agency
Gerald Eve LLP
Lambert Smith Hampton Group Ltd
Montagu Evans LLP
NPS Property Consultants Ltd
Wilks Head & Eve LLP

Lot 1b Rating Valuation

Organisation
BNP Paribas Real Estate
Bruton Knowles
Cushman & Wakefield
Gerald Eve LLP
GL Hearn
GVA Grimley Ltd
Montagu Evans LLP
Wilks Head & Eve LLP

Lot 1c General Valuation

Organisation
Barford & Co
Carter Jonas LLP
DVS Valuation Office Agency
Gerald Eve LLP
Lambert Smith Hampton Group Ltd
Montagu Evans LLP
NPS Property Consultants Ltd
Whybrow & Dodds Ltd
Wilks Head & Eve LLP

Lot 2a Commercial Agency

Organisation
APB (Leicester) Ltd
Barford & Co
Berrys
Bidwells LLP
Bruton Knowles
Carter Jonas LLP
Cushman & Wakefield
Gerald Eve LLP
Lambert Smith Hampton Group Ltd
Mather Jamie
NPS Property Consultants Ltd
Whybrow & Dodds Ltd

Lot 2b Agricultural Agency

Organisation
Bidwells LLP
Bruton Knowles
Carter Jonas LLP
King West Ltd (t/a King West/John Martin Associates)
Mather Jamie
NPS Property Consultants Ltd
Savills (UK) Ltd
Strutt & Parker LLP

Lot 3a Lease Management- Commercial (L&T)

Organisation
Barford & Co
Berrys
Bruton Knowles
Carter Jonas LLP
Lambert Smith Hampton Group Ltd
NPS Property Consultants Ltd

Lot 3b Lease Management- Agricultural (L&T)

Organisation
Bidwells LLP
Bruton Knowles
Carter Jonas LLP
Fisher German LLP
NPS Property Consultants Ltd
Savills (UK) Ltd
Strutt & Parker LLP

Lot 3c Lease Management- Agricultural (Estate & Farm Buildings)

Organisation
Bidwells LLP
Bruton Knowles
Carter Jonas LLP
Savills (UK) Ltd
Strutt & Parker LLP

Lot 4 Property & Estate Management

Organisation
Barford & Co
BNP Paribas Real Estate
Bruton Knowles
Carter Jonas LLP
NPS Property Consultants Ltd

Lot 5a Strategic Asset Management including Development Consultancy (Urban)

Organisation
Carter Jonas LLP
Cushman & Wakefield
Gerald Eve LLP
GL Hearn
Gleeds Advisory Ltd
Lambert Smith Hampton Group Ltd
NPS Property Consultants Ltd
Savills (UK) Ltd
Whybrow & Dodds Ltd

Lot 5b Strategic Asset Management including Development Consultancy (Rural)

Organisation
Bidwells LLP
Bruton Knowles
Carter Jonas LLP
Savills (UK) Ltd
Strutt & Parker LLP

Lot 6 Planning Consultancy

Organisation
Amec Foster Wheeler Environment & Infrastructure Ltd
Atkins Ltd
Carter Jonas LLP
Peter Brett Associates LLP
Savills (UK) Ltd
The Environment Partnership (TEP) Ltd
RPS Consulting Services Limited

Lot 7 Compulsory Purchase and Compensation

Organisation
Ardent Management Ltd
Bidwells LLP
Bruton Knowles
Carter Jonas LLP
DVS / Valuation Office Agency
Gerald Eve LLP
NPS Property Consultants Ltd
Terra Quest Solutions Ltd

Geographical Coverage

Please ensure that you refer to [Appendix 5](#), which details the geographical coverage of all organisations awarded on the framework, to ensure that the suppliers are able to service your geographical area.

4. Pricing Information

Pricing for direct awards is available on request by contacting resources@espo.org and requesting the accompanying spreadsheet.

ESPO will require a completed Customer Access Agreement ([Appendix 1](#)) before sending out any pricing information.

Please note that pricing includes travel, out of pocket and normal office expenses, excludes VAT, and may be subject to change within the period of the framework.

The generally recommended way of establishing pricing terms is to conduct a further competition, but should you decide that there is only a single supplier who can properly meet your needs, then the framework allows you simply enter into the terms in the customer agreement with that supplier without the need to run a competition. Further details on how to order can be found in Section 5.

5. How to Place an Order

Step 1

By reference to www.espo.org check you have the latest issue of the User Guide.

Complete the Customer Access Agreement (see [Appendix 1](#)) and send it to ESPO who will counter sign the agreement and return it to you.

This doesn't commit you to anything, but should you go ahead and use the framework it will form part of your own audit trail, helping to evidence the fact that you are procuring using the framework, and are therefore exempt from undertaking time consuming EU-compliant advertising and supplier vetting.

Step 2

There are two ways of procuring from the framework:

- Call-off without competition
- Further competition

These two approaches are explained in more detail below, to help you select the most appropriate method for your particular circumstances and requirements.

Given the wide scope of the framework's lots please note that there may be instances whereby suppliers decline to accept or bid for work due to the fact they do not have the competency or capability to undertake such work. It is therefore advisable for customers to initially contact supplier(s) prior to formally using the framework in order to ascertain what response/interest they are likely to receive to their requirements.

Call-off without competition

- Identify the most suitable supplier which best meets your requirements, making the selection on the basis of pricing submitted at framework stage, the information provided in this user guide and the supplier geographical coverage document.
Pricing information is available upon request to ESPO, with a completed access agreement ([Appendix 1](#) of this user guide). The supplier geographical coverage document is available for download from our website www.espo.org or upon request via email to resources@espo.org
- Check and satisfy yourself that the terms and conditions set out in [Appendix 4](#) are acceptable to you, as these will form the basis of the legal agreement between you and the supplier, and cannot be changed or added to.
- Contact your chosen supplier direct and place your order, quoting **ESPO Framework 2700/15**. You will be entering into the terms in the framework agreement with this supplier. An example call-off order form is referenced within [Appendix 2](#).
- Ensure you receive confirmation from the supplier of the quoted prices for your specific order requirements.

If you are considering accessing the framework in this way, then you should bear in mind that you may be asked to demonstrate that despite the absence of competition, you have secured value for money.

If you need to seek pricing information from a supplier (i.e. obtain a quotation or tender) before you are able to place an order, then you are in effect running a further competition and should do so in accordance with the rules set out below.

Further competition

A further competition is simply an exercise to reopen competition under the framework, intended to secure formal quotations from some or all of the suppliers listed on the framework, tailored to your precise requirements. Because it is based on simple, competitive tender process, it offers you a way of testing and demonstrating value for money.

Template further competition documentation is available free of charge from ESPO. Please email resources@espo.org to request this documentation.

Before you start the further competition process it is a good idea if you have thought about exactly what it is that you want from your supplier. Compiling a clear list of requirements will enable suppliers bidding for your contract to offer a service that meets your needs in the most cost-effective way.

To be compliant with procurement law, your competition must be conducted in accordance with the following:

- You must invite all suppliers who are parties to the framework, except those (if any) who clearly cannot meet your requirements, for example they do not service your geographical location or are not awarded on your selected framework lot, as shown in Section 3.
- Your tender document must describe the requirement, and tell suppliers the basis on which you will evaluate their offers (e.g. price, quality, etc. together with a clear statement of the relative importance of these criteria i.e. the evaluation criteria to be used).

Framework 2700 – Estate Management Consultancy Services Issue 23

- The Public Contracts Regulations 2015 (as amended) require that further competition tenders are evaluated in accordance with the terms of the framework agreement. Details of the evaluation criteria for further competitions under this framework can be found below, and may be varied as indicated.
- You must allow suppliers sufficient time to prepare and submit their bids. Normally three to four weeks should be regarded as the minimum.
- Bids must be submitted in written hard copy format, or via an electronic portal, in order to adhere to the point below.
- You must tell bidders the closing time and date for submitting their bids. You must not open any bids before this deadline, or consider any bids which arrive late.
- Evaluate the tenders submitted by the required deadline. You must treat all bidders equally and fairly, and evaluate all bids in the way you described in the tender documentation.
- If you have decided to apply a standstill period then you must advise all suppliers of the outcome via email or by letter – see Remedies Rules below.
- Place an order with the successful supplier quoting **ESPO Framework 2700/15** using the template referenced in [Appendix 2](#).

Evaluation Scheme

Typically the further competition will be run by inviting suppliers to complete a concise tender document, which will then be evaluated by officers using the same criteria used to establish the framework. Whilst customers are required to use the same criteria as that used at framework stage, Customers will also be entitled to vary the criteria weightings to suit their specific requirements, see below;

	Percentage Range (%)
Non-Price	20% to 60%
Price	40% to 80%

If you require guidance for the appropriateness of weightings to be used, please contact the buyer as detailed in Section 1 on the User Guide.

Remedies Rules

There is a technical matter which customers should be aware of relating to the award of all contracts, called the **EU Remedies Directive (Remedies Rules)**. If the total (i.e. lifetime) value of your contract exceeds the threshold set by the EU (as at 1.1.16 £164,176 for supplies and services, and subject to review every 2 years) then a Remedy of Ineffectiveness may apply if the contract award is challenged by an unsuccessful service provider.

However if a voluntary '**standstill period**' is applied to the award of a contract (which must be of at least ten days (if the notification is by email) and fifteen (if the notification is by post) between advising service providers the outcome of the exercise and making a formal award of contract), then this avoids the Remedy of Ineffectiveness.

The way in which service providers should be advised of the outcome of the tender exercise, at the start of the standstill period, is set out in the Public Contracts Regulations 2015 (as amended). In summary, the Regulations say that you must tell all service providers the name of the company which won the contract, together with the winning score against each of the evaluation criteria you used, the particular service provider's own score and the characteristics and relative advantages of the winning bid.

Step 3

Complete the Confirmation of Award Form (see [Appendix 3](#)) and send it to ESPO.

This should be completed whether you have placed a call-off order or conducted a further competition as this will allow ESPO to monitor the spend being put through to suppliers under the framework agreement.

6. Managing the Framework

As this is a framework from which customers can call off or conduct further competitions, ESPO will not be involved in the day-to-day management of the suppliers and the services they provide. ESPO will however be closely monitoring the progress and performance of the arrangements throughout the entire duration of the framework to ensure that customers' needs are being adequately met.

It is important therefore that each time the framework is used, customers contact ESPO to advise when and for what the framework is being used, using the Customer Access Agreement and Confirmation of Award Forms described above. This will also enable ESPO to put customers in touch with each other (by mutual agreement) where similar requirements exist, to get references, feedback and information.

In monitoring this contract, any feedback you wish to provide can be sent to ESPO via email to resources@espo.org .

7. Background to the Procurement

This section is simply background information, which may be of interest to customers who are considering using the framework and wish to understand a little more about the process ESPO follows when setting them up.

How ESPO Established the Framework

- A formal notice inviting expressions of interest from potential suppliers was published in the Official Journal of the European Union (or 'OJEU') in April 2014 (OJEU ref 2014/S 081-141504). The corresponding award notice is tbc.
- The procurement process adopted by ESPO was based upon the Open tendering procedure as detailed in the European Communities Combined Directive (2004/18/EC).
- A detailed and thorough evaluation of the tenders that were submitted was completed by officers of ESPO, with the participation of Cambridgeshire, Leicestershire and Northamptonshire County Councils. The objective of the framework was not to promote one single preferred supplier but instead to offer a range of service solutions from a number of leading suppliers in the marketplace.
- ESPO, has established the terms and conditions which will apply to any call-off arrangements by customers during the period of the framework. ESPO reserves the right in exceptional circumstances to vary the composition of the framework. For example if a supplier fails significantly to perform as required it may be removed.

Evaluation Scheme for the Framework

As there were a number of different lots, each lot was evaluated separately to ensure tenders for the same lot were assessed against each other.

The evaluation involved two stages, qualifying and award; those offers that met the qualifying criteria were then scored against the award criteria.

The qualifying criteria included assessment of the following; compliance of bid, financial standing, insurance levels, experience and references, quality and contract management, environmental and health & safety procedures, business continuity plans, equality and diversity, qualifications and accreditations, compliance with contract regulations and compliance with the terms and conditions.

The award criteria were divided into two areas; service delivery and price and the specific weightings used were as follows:

- Non-Price 60%
- Price 40%

The total non-price score added to the price score gave the grand total of points and a position on the framework was awarded to the highest scoring suppliers in each of the lots as described in Section 2 of the user guide.

Framework Documentation

If you, or your procurement or legal advisors, wish to know anything about the documentation we used in setting up the framework please contact ESPO by emailing resources@espo.org

Period of the Framework & Right to Extend

This framework commenced on 13 January 2015 and will be in place until 12 January 2019.

Please note that the duration of the individual contracts awarded under the framework should not be longer than four years. The length of the call-offs should be appropriate for the services in question, in line with value for money. It may be necessary for individual call-offs, awarded during the period in which the framework is in operation, to continue beyond the end of the framework arrangement. This should not be done in order to circumvent the rules – for example, it would be difficult to justify awarding a call off for 12 months just before the end of the framework agreement, where the normal length for such call-offs is one month.

Contractual Structure

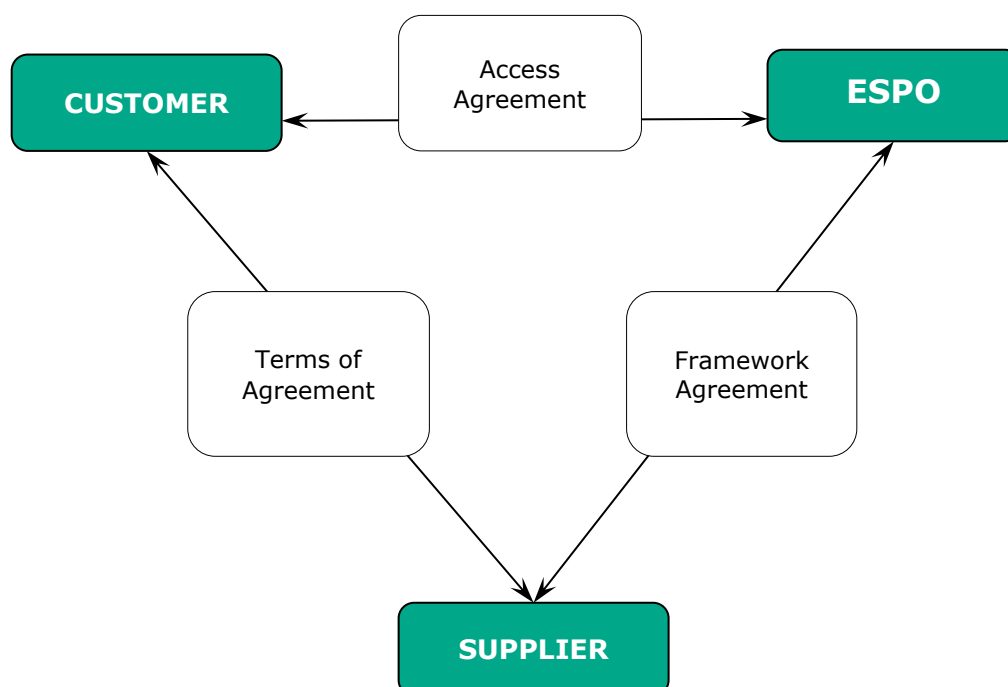
A body wishing to procure using the framework (the Customer) will enter into a contract for the supply of Estate Management Consultancy Services based on the pre-agreed terms and conditions of contract. A copy of these is referenced within [Appendix 4](#).

Whilst these pre-agreed terms and conditions may be amended by customers conducting a further competition; any such amendments must not vary substantially from the original terms agreed and must be communicated to suppliers on the framework at the start of the further competition process, i.e. when the Invitation to Tender is issued.

It is anticipated that day to day transactions (including undertaking further competitions, the appointment of suppliers and delivery of and payment for services) will all be conducted directly between the customer and supplier.

The contract structure diagram shown at Fig.1 illustrates the relationship between the parties to the arrangement.

Fig.1



APPENDIX 1

CUSTOMER ACCESS AGREEMENT**ESPO Framework Agreement
2700/15 Estate Management Consultancy Services****TO BE COMPLETED BY THE CUSTOMER**

Before conducting any activity under this ESPO framework, please complete this form in BLOCK CAPITALS and return it (by post, fax or email) to ESPO.

AGREEMENT: I confirm that the organisation detailed below wishes to access the above-mentioned ESPO framework agreement, and that in doing so will act in accordance with the guidance and instructions set out in the relevant ESPO User Guide, and in accordance with the Public Contracts Regulations 2015.

I acknowledge that suppliers' pricing under the Estates Management Services Consultancy Framework (2700/15) agreement is commercially sensitive and could well prejudice the commercial interests of the suppliers involved if the information were to be made publicly available.

I therefore hereby agree on behalf of the said organisation that we will keep strictly confidential the pricing information supplied to us and will not disclose the same or any part thereof to any other person, organisation or company and shall not make any use of such information or any part thereof for any purposes other than for accessing the framework.

I further agree that access to all such information will be restricted only to those persons reasonably required to know it and that, in any event, our employees, agents, consultants and sub-contractors (if any) are bound to us to hold such information in confidence and to use such information only for the purposes of accessing the framework.

Signature:	
Print name and department:	
Date:	
Name of organisation:	
Telephone:	
E-mail:	
At this stage, which framework lot and supplier do you intend to use?	
At this stage, do you intend to call-off or run a further competition?	
Approximate value of your requirement:	

To return this form please email to Chloe Muir: resources@espo.org

ORDER FORM

ESPO Framework Agreement 2700 Estate Management Consultancy Services

This document is available for download from our website www.espo.org , on the 2700 framework page.
Alternatively, please request the order form from ESPO, by emailing resources@espo.org

CONFIRMATION OF AWARD

ESPO Framework Agreement 2700/15 Estate Management Consultancy Services

TO BE COMPLETED BY THE CUSTOMER:

I confirm the details of the following award of contract under ESPO framework agreement ref 2700/15:

Name of Organisation:	
Name of person signing this form:	
Signature:	
Date:	
Telephone:	
E-mail:	
Framework Lot Utilised:	
Brief description of requirement:	
Awarded Supplier:	
Approximate value of Award:	
Date of Award:	
Duration of contract:	
Direct award or further competition:	
Savings achieved:	
Are you happy to be contacted by ESPO to discuss your experience of using the Framework?	YES / NO

To return this form please email to resources@espo.org

TERMS OF AGREEMENT

ESPO Framework Agreement

2700/15 Estate Management Consultancy Services

This document is available for download from our website www.espo.org , on the 2700 framework page. Alternatively, please request the order form from ESPO, by emailing resources@espo.org

A copy of these order terms should be included with any contract placed with a service provider on the framework. The terms should also form part of your further competition tender documentation if you are accessing the framework via this method.

APPENDIX 5

Supplier Geographical Coverage

This document is available for download from our website www.espo.org , on the 2700 framework page.
Alternatively, please request the order form from ESPO, by emailing resources@espo.org