**FRAMEWORK USER GUIDE**

**TOTAL FACILITIES MANAGEMENT**

**EU TENDERED FRAMEWORK AGREEMENT**

**CONTRACT PERIOD 14 AUGUST 2017 TO 13 AUGUST 2020**

**PLUS OPTION OF EXTENSION TO 13 AUGUST 2021**

**Awarded by:**



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| **FOREWORD** |

This framework agreement has been awarded as the result of a full EU tender exercise. To ensure that you maintain the EU cover for your requirement you should follow the processes detailed within this document when engaging with suppliers on the framework agreement.

The contracting authority for this framework agreement is the Crescent Purchasing Consortium. The agreement started on the 14 August 2017 and runs for an initial 3 year period with the option to extend for a further 1 year period. Contract review meetings are held annually or as and when required.

The framework agreement is for the provision of Total Facilities Management Services.

The services covered under the Total Facilities Management Framework are:–

1. Building Cleaning Services (Major Service)
2. Mechanical, Electrical and Building Fabric Maintenance Services (Major Service)
3. Catering Services (Major Service)
4. Manned Guarding Services (Major Service)
5. Waste Management Services (Minor Service)
6. Grounds Maintenance Services (Minor Service)
7. Estates Management (Minor Service)
8. Additional Services – Reception, Postal, Energy, Water (Minor Service)

**To use this framework users are required to call off a minimum of 2 of the major services listed above under one TFM contract but are encouraged to utilise as many of the services available**.

The contract is managed by the Tenet Procurement Services. Please contact Craig Lockley on 01376 511411 or by email on craig.lockley@tenetyservices.com for further information.

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| **FRAMEWORK LOTS** |

The framework agreement is split into 13 Regional Lots. The suppliers that have successfully passed the selection and award stages of the tender exercise for each region can be found in the embedded spreadsheet below.



Please see below for definition of Regions:



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| **ENGAGING WITH SUPPLIERS ON THIS FRAMEWORK AGREEMENT** |

You are required to invite all capable suppliers on the framework from within your lot region to submit a tender for your requirement. You can award to one supplier for any duration up to the maximum contract period which is usually 5 years (3 + 1+ 1).

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| **MERGERS** |

Where a member believes that during the course of a contract term, they may merge, be merged, acquire or be acquired by or with another institution, this should be clearly stated in any further competition documentation provided to suppliers on the framework.

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| **UTLISING EXTERNAL SUPPORT TO CONDUCT A MINI COMPETITION** |

Users have the following options if they wish to proceed to mini competition using this framework:

**(1) Conduct the exercise themselves**

If sufficient expertise exists within the institution, this is a straightforward option although it may be wise to properly work out the cost of carrying out this exercise and compare with that available from the other options below. It is suggested that the process detailed below is used as good guidance for the exercise itself.

**(2) Utilise Tenet Procurement Services and a consultant to manage a tender on your behalf**

Tenet Procurement Services Ltd

Tel: 01376 511411

**Email:** [mail@tenetservices.com](mailto:mail@tenetservices.com)

Web: www.tenetsprocurement.com

**(3) Utilise own consultant**

Users may wish to utilise their own procurement consultants to carry out the mini competition. Again it is recommended that they are asked to utilise the process detailed below.

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| **RECOMMENDED PROCESS FOR CARRYING OUT THE MINI COMPETITION** |

The Total Facilities Management Framework will enable users to carry out a mini competition as the basis for selecting suitable Contractors. At least 6/8 weeks should be allowed for the whole process.

**Day 1**

Look at existing services and establish what is required from the Contractor for the future and establish as precisely as possible what changes are required. This is likely to include: -

Building Cleaning

Look at existing cleaning services and establish what is required from the Contractor for the future. This is likely to include identifying buildings to be cleaned, day janitorial requirements, opening hours etc. The Institution will need to provide a detailed background of the types of buildings, number of staff and a full range of information for the tender which will include current staffing breakdown, current cleaning times, TUPE Information and square metres of areas to be cleaned.

Mechanical, Electrical & Building Fabric Maintenance Services

Look at existing maintenance services and establish what is required from the Contractor for the future. This is likely to include identifying assets to be maintained, identifying any existing maintenance contracts, identifying any warranty agreements and carryout a condition survey of the existing plant and equipment.

The Institution will need to provide a background of the types of buildings and a full range of information for the tender which will include current staffing breakdown if applicable along with TUPE Information, plus a list of assets to be maintained, emergency response requirements etc.

Catering Services

Your current catering services need to be examined to establish what is required from a catering contractor for the future, including any capital investment, changing and modernising the operation, innovative concepts, value for money and sustainability.

The Institution will need to provide information as laid out below: -

* Profile of the institution;
* Number of staff, full & part time;
* Ethnicity profile of staff;
* Actual sales full year, budgeted sales for coming year;
* Current menus and pricing;
* Opening hours;
* TUPE including pension arrangements;
* Any perceived capital investment;
* Financial Information;
* Any additional requirements.

Manned Guarding Services

Look at existing security services and establish what is required from the Contractor for the future. This is likely to include: -

* Identifying any existing security contracts;
* Identifying your current staffing breakdown;
* Identifying any staff that would be required to TUPE transfer;
* Identifying your Institution’s security needs in normal working hours and outside of normal working hours;
* Provide a background of the types of buildings and security systems in place;
* Provide a person specification for a security officer which includes a list of duties to be performance by security officers.

Waste Services

Look at the existing waste management services and establish what is required from the Contractor for the future and establish as precisely as possible what changes are required to the current delivery of services. This is likely to include identifying any current waste streams that require management, any future waste streams that require management, any specialist waste streams that require management, identifying your institution’s waste management service needs in normal working hours and outside of normal working hours. It will also need to consider site access times due to the nature of the institutions service and staff/visitor movements during peak and non-peak periods. The Institution will need to provide very specific information with regards to its operations and requirements

Grounds Maintenance

Look at existing grounds maintenance services and establish what is required from the Contractor for the future and establish as precisely as possible what changes are required. This is likely to include identifying any existing grounds maintenance contracts, identifying your institution’s grounds maintenance needs in normal working hours and outside of normal working hours. It will also need to take into account staff and visitor movements during peak and non-peak periods and site access. The Institution will need to provide very specific information with regards to its operations and requirements.

Estates Management

Look at existing estate management services and establish what is required from the Contractor for the future. This is likely to include: -

* Reviewing the current estates management service in regards to estates management team structure at site and requesting recommendations to future estates management team structure;
* Reviewing provision and recruitment processes of suitable estates staff and teams and requesting recommendations on recruitment;
* Request the Contractor conducts the recruitment and training of estates management personnel;
* Review the full institution estate and make recommendations on how the estates can be managed and maintained more effectively;
* Request the Contractor takes ownership of the full estates management provision and estates management personnel.

Additional Services – Reception, Postal, Energy, Water

Look at existing reception provision, postal service and utilities providers and establish what is required from the Contractor for the future. This is likely to include: -

Reception services

* Reviewing the current reception service in regards to reception team structure at site and requesting recommendations to future reception team structure;
* Reviewing provision and recruitment processes of suitable reception staff and teams and requesting recommendations on recruitment;
* Request the Contractor conducts the recruitment and training of reception personnel;
* Review the reception processes and request recommendations;
* Review the current reception area and the effectiveness of its location, layout and setup and request recommendations;
* Request the Contractor takes ownership of the full reception provision and reception personnel.

Post room services

* Reviewing the current post room service in regards to post room service staffing requesting recommendations;
* Reviewing provision and recruitment processes of suitable post room service staff and teams and requesting recommendations on recruitment;
* Request the Contractor conducts the recruitment and training of post room personnel;
* Review the post room processes and request recommendations;
* Review the current post room area and the effectiveness of its location, layout and setup and request recommendations;
* Review the post room delivery schedules and how these are managed and request recommendations;
* Request the Contractor takes ownership of the full post room service provision and post room personnel.

Utilities

* Review all current utilities agreements and request recommendations to current agreements;
* Request that the supplier reviews the utilities market and provides recommendations as to which utilities agreements the institution should partner with;
* Request that the contractor takes ownership of all utilities and includes these within the TFM Contract price as a separate entity.

**Day 2**

Produce a Mini Competition Tender document and invite Contractors from the specific framework lots to attend the institution for a site visit. It is advisable that you allow the Contractors at least 4 weeks to return their tenders.

**Day 3**

Site Visit where all capable suppliers on the framework agreement are invited to attend the Institution where a tour of the buildings, perimeter and car parks etc will take place. The response to any questions raised at the site visit should be circulated to all suppliers.

**DAY 4/5/6**

Evaluate tenders mirroring the scoring mechanism in the framework.

**DAY 7**

Notify all suppliers of the award decision, allowing for a 10 day standstill period (voluntary), before issuing the contract to the successful supplier.

**NB: If TUPE applies it is advisable to allow Contractors a 4 to 6 week mobilisation period from the end of the voluntary standstill period to the start date of the contract. This mobilisation period is required for the TUPE transfer process and / or the recruitment process.**

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| **ISSUING YOUR QUOTATION REQUEST** |

We advise that Users use an e-procurement portal to conduct a mini competition or if you wish to contact the suppliers via email directly please ensure that you quote the framework name on any communications you send to the supplier(s). ***Tenet Procurement Services cannot be held responsible if you might have failed to get the contracted terms where the relevant reference is not provided to the supplier(s) at the time of conducting a mini competition.***

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| **TENDER EVALUATION CRITERIA** |

**SELECTION CRITERIA**

Suppliers were evaluated against a range of criteria including:

* Economic & Financial Standing - all suppliers were required to pass a financial risk assessment.
* Technical and professional ability
* Quality Management System procedures
* Use and management of subcontractors
* Compliance with Equality Legislation
* Compliance with Environmental Legislation
* Compliance with Health & Safety standards

The selection criteria cannot be revisited during the mini-competition process, this has been provided for information only.

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| **TENDER EVALUATION CRITERIA** |

The framework agreement was awarded using the following award criteria and these should be applied when conducting your mini-competition. Please note that contracting authorities (“Participating Institutions”) will be allowed to vary the weightings of the award criteria within the range of 50% and 200% (i.e. half or double their original tender weighting). The total % must always be 100%.

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| **Sub-Criteria** | **Detail** | **Question Weighting %** |
| **Contract Management & Staffing (20%)** | | |
| Management & Supervisory Provision | * Levels of onsite supervision at a site with a minimum of 2 major TFM services\* * Supervisory structure on and off site at a site with a minimum of 2 major TFM services\* * Area management supervision at a site with a minimum of 2 major TFM services\* * Senior management involvement at a site with a minimum of 2 major TFM services\* | 25 |
| Rate of Pay and Terms and Conditions to all staff | * Wage rates to all staff * Terms and Conditions to all staff | 5 |
| Onsite staff security procedures | * Level of DBS employees are required to have to work onsite (if applicable) * Full vetting and security procedures * Safeguarding training provided (if applicable) * Any further security requirements | 10 |
| Area Management Provision | * Frequency of Area Manager site visits at a site with a minimum of 2 major services\* * Number of other contracts the Area Manager is responsible for | 10 |
| Mobilisation | * Example mobilisation plan * Is there a mobilisation team in place * Is there a mobilisation manager in place * Experience of TUPE transfers * Experience of employee transfer with pension entitlements | 25 |
| **Sub-Criteria** | **Detail** | **Question Weighting %** |
| **Contract Management & Staffing (20%) Continued…** | | |
| Absence Management Resources | * Immediate absence resources specific to this lot for all services * Longer term absence resources specific to this lot for all services * Specific lot location expertise and experience for all services | 15 |
| Training | * Training delivery for all services * Training timescales for all services * Training levels for all services * Specific site training for all services * Management / Supervisor training for all services | 10 |
| **Customer Care (10%)** | | |
| Audit Personnel & Frequency | * Level of Senior Management involved in quality audits for all services * Frequency of quality audits daily to annual checks for all services * Description of the full audit process conducted for all services | 25 |
| Audit Communication | * How are the audits communicated to the client i.e. portal, email, paper based | 25 |
| Helpdesk | * Helpdesk facility service provision | 50 |

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| **Sub-Criteria** | **Detail** | **Question Weighting %** |
| **Service Delivery (40%)** | | |
| Building Cleaning Services | * Expertise demonstrated in providing a building cleaning service in the public sector * Evidence provided demonstrating expertise and experience in: - * Productivity rates for different sized clients * Different cleaning methodologies and cleaning structures * Electronic time and attendance and online portal availability * Any other expertise demonstrated | 20 |
| Mechanical, Electrical and Building Fabric Maintenance Services | * Expertise demonstrated in providing a mechanical, electrical and building fabric maintenance service in the public sector * Evidence provided demonstrating expertise and experience in: - * Providing a PPM Schedule * Provision of suitable engineers for public sector contracts, including but not limited to, measures to ensure familiarity of the site * Electronic CAFM system availability * Any other expertise demonstrated | 20 |

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| **Sub-Criteria** | **Detail** | **Question Weighting %** |
| **Service Delivery (40%) Continued…** | | |
| Catering Services | * Expertise demonstrated in providing a catering service in the public sector * Evidence provided in demonstrating expertise and experience in: - * Providing different types of financial offerings i.e. nil cost, subsidised contracts etc * Providing different timed services i.e. breakfast, brunch, lunch, dinner etc * Providing additional ‘snack / coffee shop’ provisions * Providing changing menus that comply with relevant legislation * Any other expertise demonstrated | 20 |
| Manned Guarding Services | * Expertise demonstrated in providing a manned guarding service in the public sector * Evidence provided in demonstrating expertise and experience in: - * Provision of suitable officers for public sector contracts, including but not limited to, measures to ensure suitably trained staff * Assignment instructions experience / expertise for the public sector * Electronic time and attendance and online portal availability * Any other expertise demonstrated | 20 |

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| **Sub-Criteria** | **Detail** | | **Question Weighting %** |
| **Service Delivery (40%) Continued…** | | | |
| Waste Management Services | * Expertise demonstrated in providing a waste management service in the public sector * Evidence provided demonstrating expertise and experience in: - * Details of the qualifications held that will be provided for those staff involved in the contract * General Eurobins collections * Special waste collections * Any other expertise demonstrated | 5 | |
| Grounds Maintenance Services | * Expertise demonstrated in providing a grounds maintenance service in the public sector * Evidence provided demonstrating expertise and experience in: - * Details of the qualifications held that will be provided for those staff involved in the contract * Sports marking * Specialist requirements * Any other expertise demonstrated | 5 | |

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| **Sub-Criteria** | **Detail** | | **Question Weighting %** |
| **Service Delivery (40%) Continued…** | | | |
| Estates Management Services | * Expertise demonstrated in providing an estates management service in the public sector * Evidence provided demonstrating expertise and experience in: - * Provision of suitable estates staff and teams for public sector contracts * Any other expertise demonstrated | 5 | |
| Additional Services | * Expertise demonstrated in providing any additional services in the public sector * Evidence provided demonstrating expertise and experience in: - * Reception services * Post room services * Water management * Energy management * Any other additional services demonstrated | 5 | |
| **Contract Financials (30%)** | | | |
| Contract Price | * Contract Price based on the 3 year duration | 100 | |
| **Total** | | 100% | |

**SCORING METHDOLOGY**

**Pricing / Percentage Schedule**

The lowest contract price including all TFM services submitted in accordance with the schedule of prices will be awarded the highest score and all other suppliers will be awarded pro rata scores on the relative competitiveness of their contract price compared to the lowest contract price.

**Non Pricing**

* Scores under each Quality/ Technical criteria will be awarded on the following basis:

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| **Assessment of Response** | **Scoring** |
| Excellent: Meets expectations / demonstrates clear understanding of issues/questions & expands on the response sought | 4 |
| Good: Fulfils expectations / demonstrates understanding of the issue & some thought in framing a response | 3 |
| Satisfactory: Meets expectations / standardised response / no attempt to customise / minor reservations | 2 |
| Unsatisfactory: Does not meet expectations / response is weak & does not fully address the issue / reservations | 1 |
| No Response | 0 |

\*The Major and Minor services covered under the Total Facilities Management Framework are –

1. Building Cleaning Services (Major Service)
2. Mechanical, Electrical and Building Fabric Maintenance Services (Major Service)
3. Catering Services (Major Service)
4. Manned Guarding Services (Major Service)
5. Waste Management Services (Minor Service)
6. Grounds Maintenance Services (Minor Service)
7. Estates Management (Minor Service)

8. Additional Services – Reception, Postal, Energy, Water (Minor Services)

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| **CONTACTING SUPPLIERS** |

Full contact details for each supplier appointed to this framework agreement can be found on the Tenet Procurement Services website at www.tenetprocurement.com. Contact details and other supporting information can be found here.

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| **CONFIDENTIALITY** |

All contract information held on the website is commercial in confidence and is intended for the use of public sector users only and should not be shared with any third party.

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| **INVITATION TO TENDER** |

The Invitation to Tender Document (ITT) that was used to establish the framework agreement can be found below. The ITT contains the terms and conditions, sample maintenance specification, award criteria etc.



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| **MINI COMPETITION TEMPLATE** |

Please see mini competition document below which contains templates to assist you to run your mini competition.



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| **CALL-OFF CONDITIONS OF CONTRACT** |

The following standard call-off conditions of contract have been accepted by the following suppliers: -

* Bandera PE Ltd
* Graham Asset Management
* Norse Commercial Services
* OCS Group (UK) Ltd
* Tenon FM (Office & General Environmental Services Ltd)
* Vinci Construction UK Ltd



Upon award the successful supplier will be asked to return a signed copy of the call-off conditions of contract.

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| **AMENDMENTS TO CALL-OFF CONDITIONS OF CONTRACT** |

The following five suppliers have requested amendments to the standard call off conditions of contract which will soon be included for your information below when the requested amendments have been agreed. If you need any further information please do not hesitate to contact Craig Lockley [craig.lockley@tenetservices.com](mailto:craig.lockley@tenetservices.com)

CBRE Managed Services Ltd

Interserve (Facilities Management) Ltd

ISS Mediclean Ltd T/A ISS Facility Services Education

Lorne Stewart plc

Compass Contract Services

Upon award the successful supplier will be asked to return a signed copy of the call-off conditions of contract.

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| **EVALUATION TEMPLATE** |

The following is an example of a template that could be used for evaluating the tenders once they have been received.



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| **CONTRACTS FINDER REGULATIONS GUIDANCE** |

Please see guidance below on how the regulations surrounding advertising contracts that exceed £25,000 on Contracts Finder may apply to your Institution.



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| **OTHER DOCUMENTATION – OJEU NOTICES** |



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| **DETAIL OF EU REQUIREMENTS** |

Under the EU Regulations in respect of this particular framework agreement, you are required to carry out a mini competition exercise.

Where the terms laid down in the framework agreement are not precise enough or complete for the particular call-off, a mini competition should be held, *with all those suppliers within the frameworks capable of meeting the particular need.*

* This does not mean that basic terms can be renegotiated, or that the specification used in setting up the framework can be substantively changed;
* Substantive modifications to the terms set out in the framework agreement itself are not permitted. It is more a matter of supplementing or refining the basic terms to reflect particular circumstances for the individual requirement.

Examples of such terms are:

* Particular service requirements;
* Particular invoicing arrangements and payment profiles;
* Additional security needs;
* Incidental charges;
* Particular associated services, e.g., installation, maintenance & training;
* Particular mixes of quality systems and rates;
* Particular mixes of rates and quality;
* Where the terms include a price mechanism;
* Individual special terms, e.g. specific to the particular products/services that will be provided to meet a particular requirement under the framework.

Where a mini competition is held for a particular call-off, the contracting authority should consult in writing (invite to tender) *the providers within the framework which are capable of meeting the particular need.* **This does not necessarily mean that every provider in the framework must be included.** A framework may cover a number of different regions, supplies or services and there is no obligation to consult those providers which had not agreed, in awarding the framework, to provide the particular supplies or services which are the subject of the call-off or the geographical coverage. Indeed, the framework may be divided into categories (lots), each covering different supplies or services. In that case, the authority only need consult providers in the categories which cover the goods or services required.

However, there is no requirement, at this stage, to run a selection procedure, based on technical ability, financial standing, etc. This will have been carried out before the framework itself was awarded and should not be repeated at the mini competition stage. The decision on who should be consulted should be made on the basis of the kinds of supplies or services required and which providers can supply them, based on their offers at the time the framework agreement itself was awarded.

Contracting authorities should:

* State the subject matter for the call-off for which tenders are being requested;
* Also state a time limit which is sufficient to enable the selected providers to submit their bids for the particular call-off;
* This time limit should take account of the complexity of the call-off and the time needed for the different tenderers to submit their bids;
* Where the authority has decided to make use of the option to hold an electronic auction for the mini competition, it must abide by the rules covering e-auctions as set out in the Directive and Regulations;
* Tenders should be submitted in writing and they should remain confidential until the time limit has expired;
* The contracting authority should award the call-off to the provider which has submitted the most economically advantageous tender on the basis of the award criteria set in out the framework itself, focusing on the particular requirement;
* New award criteria should not be added, but weighting may need to vary to reflect the particular requirement.



**When carrying out a mini competition and depending on the anticipated value of the exercise, you must take into consideration your Institution’s own financial / purchasing regulations. It is important to note that EU Law takes precedence over local financial / purchasing regulations.**

**Please see below additional general guidance on conducting a mini-competition exercise.**

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| **CONTACT US** |

The contract is managed by the Tenet Procurement Services Ltd for Crescent Purchasing Ltd. Please contact [craig.lockley@tenetservices.com](mailto:craig.lockley@tenetservices.com) for further information.