



Defence  
Infrastructure  
Organisation

## **Schedule 28**

### **Part 1 – General Information**

#### **Built Estate**

## SCHEDULE 28 PART 1 – GENERAL INFORMATION BUILT ESTATE

### Document Change Record

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# SCHEDULE 28 PART 1 – GENERAL INFORMATION BUILT ESTATE

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## 1. Introduction

- 1.1. The role of the MOD (the Buyer) is to protect the people of the UK, prevent conflict, be ready to fight our enemies. The Defence Infrastructure Organisation (DIO) is the part of the MOD that provides and maintains infrastructure, including Hard Facilities Management (HFM) services. The provision of HFM services is a key enabler in the support of operational capability, by contributing to the health and safety of Armed Forces personnel, their motivation and their satisfaction. HFM services provide the benign environment that overlays and incorporates the physical infrastructure to support personnel when not on operations, while recuperating or training and is therefore key to maintaining an effective operational capability.
- 1.2. HFM services are a feature in all UK home base locations where defence people live, work or conduct training. Service demands change depending on the particular customer, its role, geographical location and local environmental factors. Consequently, the supply of the Services must be flexible in nature to match particular requirements and also adaptable to changing circumstances; such as the Better Defence Estates Strategy. The benefits of achieving greater commonality in Services across FDIS's regional contracts and better packaging of HFM services, must be balanced against the ability to deliver local variances in order to best meet local needs, recognising that 'one size does not fit all'.
- 1.3. The Services provided by the Supplier shall be capable of adapting to the changing needs and expectations of our Customers, the Government and other stakeholders. Through this Contract, the Buyer is seeking to transform the way that the Services are provided to the defence community. The Supplier shall ensure that technological innovations and advances are fully embraced, increasingly ensuring at all times that industry norms and best practice is delivered.

## 2. Core Values

- 2.1. The DIO's core values underpin its vision and mission. They support delivery and shape how the Buyer and Supplier shall work together, as follows:
  - 2.1.1. **Safety First.** Safety first in everything we do.
  - 2.1.2. **Collaboration.** Working in partnership.
  - 2.1.3. **Integrity.** Doing the right thing, not just the easy thing.
  - 2.1.4. **Agility.** Moving at pace to meet new demands.
  - 2.1.5. **Accountability.** Delivering on your promises.
  - 2.1.6. **Enthusiasm.** Passionate about what we do and spirited in how we do it.

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### 3. Outcomes and Success Measures from the Contract

3.1. The Buyer sets out below the following outcomes it expects from the Contract and the measures of success which will be core to success.

#### 3.2. Outcomes:

- 3.2.1. Long term collaborative relationship.
- 3.2.2. High customer satisfaction.
- 3.2.3. Excellent quality customer service delivery.
- 3.2.4. Compliance with statutory requirements and legislation.
- 3.2.5. First class operational delivery.
- 3.2.6. Sustainable innovation and continuous improvement.
- 3.2.7. Application of smart building technology.
- 3.2.8. Support to Asset Management maturity.
- 3.2.9. Excellent financial management.
- 3.2.10. Value for money.
- 3.2.11. Demonstrable contribution to corporate social responsibility.
- 3.2.12. Insightful reporting.
- 3.2.13. Effective mobilisation of sites.

#### 3.3. Success Measures:

- 3.3.1. Presenting credible, realistic and sustainable innovation opportunities positively impacting on user productivity and asset efficiency.
- 3.3.2. Delivery of information, insight and solutions, to the customer to inform decision making and extending the life of the asset.
- 3.3.3. Improved customer satisfaction over time.
- 3.3.4. 100% statutory compliance.

### 4. The Armed Forces Covenant

4.1. The Armed Forces Covenant is a public sector pledge from Government, businesses, charities and organisations to demonstrate their support for the armed forces community. The Covenant was brought in under the Armed Forces Act 2011 to recognise that the whole nation has a moral obligation to redress the disadvantages the armed forces community face in comparison to other citizens, and recognise sacrifices made.

4.2. The Covenant's two principles are that:

- 4.2.1. the armed forces community should not face disadvantages when compared to other citizens in the provision of public and commercial services.

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4.2.2. special consideration is appropriate in some cases, especially for those who have given most such as the injured and the bereaved.

4.3. The Buyer encourages all bidders, and their suppliers, to sign the Corporate Covenant, declaring their support for the Armed Forces community by displaying the values and behaviours set out therein. The Buyer encourage you to make your [Armed Forces Covenant pledge](#). The Corporate Covenant gives guidance on the various ways you can demonstrate your support.

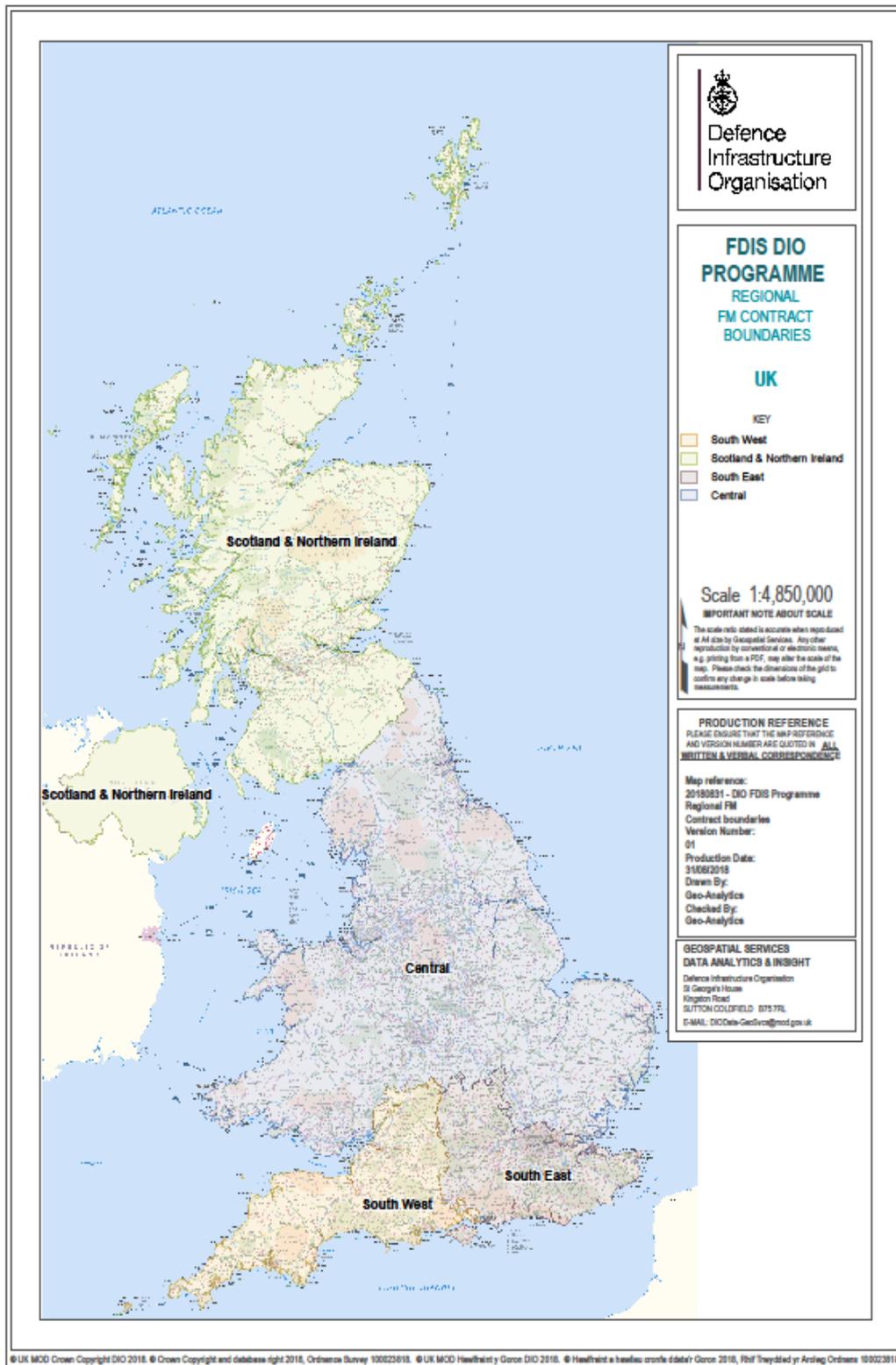
### 5. The Estate

5.1. The Buyer intends to award four HFM Contracts for the Built Estate, as follows.



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5.2. The four Contracts shall align to the DIO Regions illustrated below:



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5.3. Detail of the composition of the Defence estate within each of the regions is summarised below:

Region	Number of Establishments	Number of Level 2 <sup>1</sup> assets
Scotland and Northern Ireland	82	4399
Central	159	12945
South East	93	5766
South West	71	5951

5.4. The numbers in the table above are for information only and full detail of all Level 2 Assets in scope of the regional contracts is contained in the Buyer Supplied Information.

5.5. Over the term of the Contract there can be expected to be significant changes in the size and shape of the defence estate as a result of the BDES. This includes delivering plans to optimise the use of the estate and rationalise assets.

5.6. There is also a strategy to improve the management of data, moving towards one reliable and accurate set of data used multiple times, and it is likely that automation and technological advancements could offer significant opportunities to support the better delivery of the Services.

## 6. The Requirement

6.1. The requirement is broken down in to three areas:

### 6.1.1. Core Service.

6.1.1.1. The Core Service is non-discretionary services required to keep the Affected Property safe, legal and operational. Parts 1-11 of this Schedule contain the requirements that constitute the Core Service. This includes:

6.1.1.1.1. All testing, inspections and servicing in accordance with Statutory and Mandatory and Planned Preventative Maintenance (PPM) requirements.

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<sup>1</sup> Level 2 assets equate to Buildings

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6.1.1.1.2. All associated repairs and reactive maintenance to be delivered through an Inclusive Repair Threshold (IRT) which is defined in Call-Off Schedule 5: Pricing.

6.1.1.1.3. The following requirements in the table below, which are not subject to the IRT:

Grounds Maintenance
Snow and ice clearance
Statutory designated nature conservation sites - maintenance work identified for statutorily designated nature conservation sites.
Scheduled Monuments - maintenance work identified for scheduled monuments
Kitchen Deep Cleaning
Airfield Pavements - monthly inspection, Pavement Classification Index update report and annual report.
Airfield Ground Lighting (AGL) inspections and tests identified in the maintenance section of the aerodrome management plan.

6.1.1.2. All management services associated with the delivery of the requirements including provision of help desk facilities, as set out in Part 2: Helpdesk of this Schedule.

6.1.1.3. Professional Services (including Design services) for all Billable Works included in Value Band 2.

6.1.1.4. Sustainable development to include the effective consumption of utilities.

### 6.1.2. Non Core Services.

6.1.2.1. The Non-Core Services are discretionary services that can be called off on an annual basis to meet specific customer needs. Part 12: Non-Core Requirements of this Schedule contains the Non-Core Services requirements.

### 6.1.3. Billable Works.

6.1.3.1. Billable Works are delivered in accordance with Part 11: Billable Works of this Schedule and defined in Call-Off Schedule 4a: Billable Works.

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- 6.2. The Supplier shall have a common understanding of the Contract with the Buyer and deliver the Services to a consistent standard throughout the Affected Property. The full detail of the Services to be provided is set out in this Schedule.
- 6.3. The Supplier shall have overall responsibility for the delivery of requirements described in this Schedule twenty-four (24) hours a day and three hundred and sixty-five (365) days per annum across the Affected Property.
- 6.4. As a minimum, on normal Working Days (Mon to Fri), access to Services shall be provided from 0800 to 1700 hours (unless agreed otherwise by the Buyer). Outside of these times and on weekends and public holidays, the Supplier shall provide an Out of Hours (OOH) Service described in Part 6: Maintenance Services of this Schedule.
- 6.5. The Supplier through its work, actions and advice shall support Operational Activity by keeping the Affected Property in a Compliant and fit for use Condition.

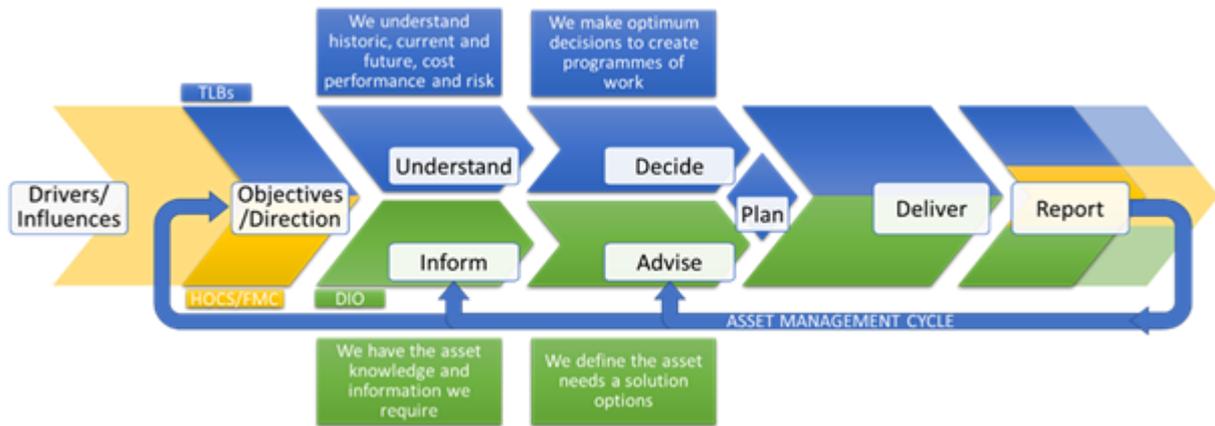
### **7. MOD SFG20**

- 7.1. The Supplier shall deliver the Services contained in this Schedule in accordance with MOD SFG20, manufacturer's instructions, Good Industry Practice, or to any other standard approved in writing by the Buyer
- 7.2. The Buyer's introduction of MOD SFG20 in to its maintenance regime provides an opportunity for the Supplier to collaborate with the Buyer to transform the management of maintenance services applied to the Estate. The Supplier shall carry out all UK Statutory, MOD Mandatory tests, inspections, servicing and all other maintenance tasks as stipulated in MOD SFG20 unless stated otherwise in Part 5: Statutory and Mandatory of this Schedule.

### **8. Asset Management**

- 8.1. The Buyer is in the process of developing its capability to better inform and advise customers through the adoption and development of its asset management capability in line with Good Industry Practice. Based on ISO:5000, the Buyer has adopted an approach to asset management that recognises its role to "inform and advise" which is aligned to the customer role to "understand and decide". An organisational change programme has been launched to continue to develop the Buyer's approach and capability over the next few years. The Project Initiation Document for the Asset Management Programme has been provided within the virtual data room for further understanding.

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8.2. One of the core principles of asset management, and a building block for everything else, is understanding cost, performance and risk. The Buyer currently has a low level of understanding of some aspects of risk (observed condition) and performance (utilisation) and is committed to develop its coverage and sophistication in all of these areas over the next few years. The Supplier shall be the primary provider of data to allow the Buyer to develop its asset management capability. The Supplier shall fully populate and maintain the asset data required for the Buyer to fulfil their asset management advisor role. The Supplier shall work with the Buyer to fully populate and maintain these asset data requirements and bring sector innovation to the contract on methods of capture, maintenance and operational insights.

8.3. The Supplier shall play a pivotal role in assisting the Buyer to mature as the Asset Management technical defence authority. The Supplier shall support engagement through attendance at both the joint Asset Management Function Working Group and at the Strategic Supplier Group. The key role of the Supplier at these Groups shall be to bring forward opportunities, emerging sector innovation, case studies and demonstrate site trials. This will complement the Buyer sharing internal thinking and priorities, including Government direction.

8.4. The Supplier shall support the Buyer in the development of a Data Quality Development Plan, including the setting of data quality targets. The plan will focus on addressing the completeness, accuracy, validity and timeliness of infrastructure Asset Data from Level 0 down to Level 4. The plan shall be aligned with the Suppliers' intervention schedules and plans such that asset data is captured, updated or validated at the time of intervention so that over the first few years of the contract the asset data quality shall be improved minimising the requirement for special data capture programmes or visits.

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### 9. Ways of Working

- 9.1. The Supplier shall deliver all Services in accordance with the principles of ISO:44001 – Collaborative Business Relationship Management Systems in a manner to complement the Buyer's Supplier Relationship Management Strategy and Corporate Relationship Management Plan, as set out in Call-Off Schedule 24: Collaboration.
- 9.2. The Supplier shall perform a Relationship Maturity Measurement exercise with its supply chain partners and the Buyer every six (6) months. This is to gain three hundred and sixty (360) degree feedback on business relationships and identify continuous improvement activities that will improve overall relationship management.
- 9.3. The Joint Partnering Board will convene at least six (6) monthly to discuss overall contractual performance as part of the Supplier Relationship Management Strategy. To inform this exercise the Supplier will be issued with a trust matrix and required to submit it in accordance with the guidance provided.
- 9.4. The Supplier shall provide representatives for the various levels of the Suppliers Association (strategic and working level) and contribute to the work arising from it.
- 9.5. The Supplier shall work with other suppliers delivering services to the Buyer to engender innovation. As part of this the Supplier shall be expected to participate in Buyer Best Practice Forums. The purpose of the Best Practice Forums will be to facilitate cross-regional knowledge transfer so that lessons learned and innovations identified in one region can be shared across the supplier base. The Forum will be scheduled periodically and will include all regional suppliers and key personnel from the Buyer as well as key supply chain partners when appropriate. The outputs of the forum will be part of the continuous improvement process and the Supplier shall be expected to attend, where appropriate, and to ensure the learnings and best practice are implemented across their respective region.
- 9.6. The Supplier shall provide sustainable access to industry intelligence and technical proficiency.
- 9.7. The Supplier shall utilise its own CAFM system and meet the requirements of this Schedule, Part 3: Information Systems and Data Management to ensure delivery of data and management information to the Buyer, and to identify opportunities and issues, bring solution thinking, insights and intelligence to make the data meaningful and support decision making.

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- 9.8. The Supplier shall increase customer satisfaction by providing excellent customer service, through innovative and proactive thinking.
- 9.9. The Supplier shall seek every opportunity to support the wider Government agenda including for social, ethical and environmental initiatives and generate immediate or future benefits for the Buyer.

### **10. Transition**

- 10.1. The Supplier shall manage the transition to the Contract and shall implement full service delivery at the In-Service Date (ISD) to meet the requirements of Part 4: Contract Mobilisation - Demobilisation of this Schedule and Call-Off Schedule 13: Mobilisation.

### **11. Management of the Service**

- 11.1. The Supplier shall manage the outputs required under the Contract and shall keep in place an appropriate organisational structure to support the operational delivery and management of a safe, legal and operational Estate throughout the duration of the Contract. The Supplier shall provide effective management and leadership at all levels of the Service.
- 11.2. The Supplier shall ensure that all Supplier's staff undertaking work against the Contract are skilled, competent and appropriately trained and follow all relevant professional codes of practice, standards, guidelines, regulations and directives, applicable to their specialist area. All staff are to be qualified for their role.
- 11.3. The Supplier shall ensure that all staff undertaking work against the Contract, both permanent and temporary, receives relevant induction, site familiarisation and training for their role.

### **12. Achievement of Value for Money**

- 12.1. The Supplier shall at all times seek to optimise the achievement of Value for Money to the Buyer. This is both for the Services delivered directly under the Contract, and for related Services carried out by Third Parties, but which are influenced by the Supplier's actions. In achieving Value for Money the Supplier shall ensure the needs of the Buyer are met.

### **13. Performance Management**

- 13.1. The Supplier shall meet extant Performance Measures specified at Call-Off Schedule 14: Performance Management throughout the term of the Contract.

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The Supplier's dedicated contract compliance manager shall provide accurate and validated data on activity and performance, in mutually agreed formats, and facilitate processing and comparison with historic information to track trends over time. The Supplier shall be responsible for the collection and generation of the full range of data required by the Buyer to support this activity.

- 13.2. The Supplier shall attend contractual performance meetings as specified in Call-Off Schedule 15: Contract Management.