



Department  
for Environment  
Food & Rural Affairs

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## **Appendix 2 – Call-Off Procedure:**

**for The Research, Development and Evidence Framework 1**

**- Lot 7.1 Resource and Waste**

**Project: Year 2 pEPR Cost Data Collection for  
pEPR LA Payment Modelling**

**Tender Reference: C25947**

**Date: October 2024**

## 1.0 Request for Proposal

- 1.1 The following document is to be used as a Call-Off template to be sent to all Contractors on a sub-lot by the Project Manager of the Contracting Authority for completion and return in accordance with the Call-Off procedures detailed in the Form of Agreement.

Research, Development and Evidence Framework				
REQUEST FOR PROPOSAL				
Project title:		Year 2 pEPR Cost Data Collection for pEPR LA Payment Modelling		
Call off Reference:		C25947		
Atamis project ref (if applicable):		C25947		
Date:		29/08/24		
Contracting Authority (Defra and its arms-length bodies etc)	Defra (Department of Environment, Food and Rural Affairs)			
Project Manager:		Email:		
Authorized by:		Email:		
Commercial Contact (if applicable):				
Project Start Date		1 <sup>st</sup> November 2024		
Project Completion Date		1 May 2025		
For any projects over the direct award threshold, full competition is required (i.e. all contractors on the Sub-Lot are invited to quote).		Direct Award		Mini-comp
Call off from Sub-Lot number (please tick)		Lot 7.1 - Resource and Waste		

**Proposal return date: (no less than 10 working days from current date)**

13 September

**Evaluation and award criteria:**

It is anticipated that 2 contracts will be awarded to the 2 highest scoring evaluated bids. The award of 2 contracts to the 2 top-scoring bidders will be subject to a minimum of 2 bids from 2 bidders being received and any minimum threshold score requirements being met. Where only 1 bid is received that meets the minimum threshold scores, the Authority will award a contract to that supplier.

For example:

4 bids are received, evaluated scores and tender outcomes are as follows:

Bidder	Quality Score	Price Score	Total Score	Outcome
Bidder A	50	30	80	<b>Bidder comes 1<sup>st</sup> and is awarded a contract</b>
Bidder B	35	12	47	Bidder comes 4 <sup>th</sup> and is not awarded a contract
Bidder C	53	26	79	<b>Bidder comes 2<sup>nd</sup> and is awarded a contract</b>
Bidder D	60	15	75	Bidders comes 3 <sup>rd</sup> and is not awarded a contract

**Contractors:** Failure to meet any minimum score threshold stated will result in the bid being removed from the process with no further evaluation regardless of other quality or price scores.

<b>Quality</b>	<b>Weighting</b>	<b>70%</b>
<b>Price</b>	<b>Weighting</b>	<b>30%</b>

**Quality Sub-Criteria Weightings: (Indicative only)**

<b>Approach &amp; Methodology</b>	<p>Please demonstrate your understanding of the importance and extent of the required tasks</p> <p>Please set out in detail each element of the methodology and how this will be carried out, including the approach, design, analytical strategy.</p> <p>Any input required from Defra should be outlined, as well as the approach to dissemination and review of the findings.</p>	<b>30%</b>
<p><b>Your response is limited to a maximum of 3 sides of A4. Please use the numbering as it appears in the question.</b></p>		

<b>Proposed Staff (inc Pen Portraits) and Contractor's experience/accreditations. Proposed Staff</b>  <b>CVs should be no more than 2 sides of A4 each in length</b>	<p>Please provide details of the proposed project team and team structure, including any sub-contractors and/or associates.</p> <p>CVs for all staff should be submitted to support the response and include a table showing the staff days expected to be spent on the project per task, this table should match the staff days in the cost proposal</p> <p>Our aim would be to get a good sense of how many people would be allocated to this task as well as their knowledge and experience in this area</p>	<b>30%</b>
<b>Project Management (including project plan)</b>	<p>Please submit proposed project management arrangements including day to day working for the project, the proposed timetable for the project, risk log and mitigation actions and a Gantt chart presenting milestones, deliverables, timelines and inter-dependencies</p> <p>Please specify how you will engage in the task and how it will be completed within the required timeframe.</p>	<b>20%</b>
<b>Quality Assurance/ Risk Response is no more than 2 sides of A4 + risk register</b>	<p>Please complete a risk register, identifying project risks and mitigating actions.</p> <p>Provide evidence as to how quality will be assured and prioritised in the process.</p>	<b>10%</b>
<b>Sustainability – Mandatory</b>	<p>The Authority has set itself challenging commitments and targets to improve the environmental economic and social impacts of its estate management, operation, and procurement. These support the Government's green commitments. The policies are included in the Authority's sustainable procurement policy statement published at:</p> <p><a href="https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement">https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement</a></p> <p>1. Within this context:</p> <p>Explain your approach to delivering the services and how you intend to reduce negative sustainability impacts. Including the effectiveness of your organization's approach for this requirement</p>	<b>10%</b>

Specification
<p>1. Description of work required – Please read the specification which is found in a separate document titled:</p> <p><b><i>'Packaging Extended Producer Responsibility Specification of Requirements EPR Year 2</i></b></p>

***Data Collection (including costs, and factors affecting efficiency and effectiveness outside LA control)'***

**Objectives of this commission**

The objectives of this commission are to support Defra and the DAs with populating our LA cost and performance model with data from LAs. Under the two data collection tasks, the asks are as follows:

**A. Year 2 RFI Cost Data Collection**

- follow the defined data collection process steps to collect the data using the Request For Information spreadsheet provided
- interpret the data, particularly in relation to efficiency
- process the data as set out in the process steps

**B. Year 2 Scheme Data Collection**

- collect up-to-date data on the residual and recycling schemes being operated by every UK LA in 2024/25.
- Collect data on every LA's best assessment of the schemes they will be providing in 2025/26, 2026/27, and 2027/28
- Collate data in the format required by the cost and performance model as specified by Defra

**Type of required expertise**

Experience has shown that obtaining useful data from local authorities requires staff with operational experience in a local authority or private sector waste management setting, that have been involved with collecting and analysis LA waste data previously. For this project we expect bidders to put forward staff with experience of working with LA operational, cost and performance data at the 4 framework grades (those specified in the framework agreement). Those are:

- Director – typically over 15 years' experience
- Senior Consultant – typically over 8 years' experience
- Consultant – typically over 5 years' experience
- Junior/Graduate – expected 0-3 years' experience

Bidders should state the member of staff being proposed against each of the four categories and state which framework rate will apply for each. A full CV should be provided for each member of staff proposed; there is no need for golden paragraphs.

**Scope of work**

The work will cover a representative sample of UK Local Authorities predominantly Waste Collection Authorities and Unitaries with a small number of Waste Disposal Authorities

The local authorities will be identified by Defra and allocated to the Contractor. It is anticipated that some of the local authorities will have completed the data collection exercise previously for Year 1 and some will be newly invited to take part.

Data for all the identified LAs will need to be collected and then collated.

Defra will provide the contractor with:

- An introductory letter to share with the Local Authority as part of the recruitment process
- A template Request for Information spreadsheet with fixed formatting, clear guidance on data required, a quality assurance tab to be completed and an efficiency summary
- Guidance on the data collection process to be followed and quality assurance that is expected to be carried out and recorded
- For local authorities that previously took part in the exercise the 21/22 RFI will be shared for information

The contractor should undertake quality assurance and data cleansing on the data collected.

All data should be provided in the correct format with consistent QA checks and number formats to enable the data to be read by the model.

For **A. Year 2 Cost RFI Collection** the schemes to be covered are:

- Collection data
  - overheads
  - residual waste (kerbside, flats/communal)
  - all separate and co-mingled collections for recycling (kerbside, flats/communal, LA-operated bring banks).
  - limited information about separate collections which are very unlikely to include packaging such as textiles, batteries, AHPs and WEEE. The information would not need to be detailed; a simple yes/no would suffice.
  - food waste, including where it is collected separately or mixed with garden waste (kerbside, flats/communal)
  - garden waste
- Income
- Disposal data
  - Overheads
  - HWRCs
  - Transfer stations, treatment and disposal facilities
  - Haulage

For avoidance of doubt, bulky waste, street cleansing, litter bins, litter sweeping, parks and gardens, gully emptying, fly tipping clearance and beach cleaning services are excluded from scope.

Cost and operational data is required for the year 2023/24.

**2. Required skills / experience from the contractor and staff.** Include any essential qualifications or accreditations required to undertake the work.

**Please refer to the specification**

- *Knowledge and ability to liaise with English local authorities*
- *Knowledge of data acquisition and management*

**3. Proposed payment table (Detailing key payment milestones & completion date where appropriate / estimable)**

Payment milestone no.	Payment milestone	Completion date (week beginning)	Payment schedule
1	Task 1 - RFI Introduction and QA Briefing - Deliverables set out in specification achieved		10%
2,	Task 2 – Collect the data - Completed RFIs returned for first 15 LAs		30%
3	Task 2 – Collect the data - Completed RFIs returned for remaining 15 Las		30%
4	Task 3 – Interpretation - Deliverables set out in specification achieved.		20%

#### **4. Risk**

**Note:** *This section is to be used to detail any risks or key elements relevant to the project i.e. Programme deliverable dates, workshops or external requirements, data, consultees, stakeholders etc that could impact the success of the project if they are not managed.*

**Any delay past April 2025 will have serious implications for the rollout of the PEPR scheme.**

## 2.0 Proposal

- 2.1 The following document is to be used as a Call-Off template to be sent to all Contractors on a sub-lot for completion and return in accordance with the Call-Off procedures detailed in the Form of Agreement.

Research, Development and Evidence Framework 2	
PROPOSAL	
To be completed by the Contractor	
Contractor's Name: Call off Reference: Sub-Lot Number: Date:	
<b>Note:</b>  Do not make or append Caveats and Assumptions in your proposal – any points of uncertainty must be raised as a clarification point prior to submitting the proposal. Where assumptions are to be made, these will be stated by the Authority's Project Manager.	
By signing this form <i>(Insert Contractors Name)</i> agree to provide the services stated above for the cost set out in your Cost Proposal and in accordance with the Research, Development & Evidence Framework 1 Conditions of Contract.	
Contractor Project Manager:	
Signature:	
Date:	

## 3.0 Order Form

- 3.1 The following document is to be completed by the Contracting Authority and sent to the Contractor for counter signature to form a Call-Off contract.

Research, Development and Evidence Framework 2
ORDER FORM

**Project title:** Year 2 pEPR Cost Data Collection for pEPR LA Payment Modelling

**Call off Reference:** C25947

**Bravo project ref (if applicable):**

**Date:** 18/10/2024

THE Contracting Authority: Department for Environment, Food and Rural Affairs  
(DEFRA)  
Noble House  
17 Smith Square  
London  
SW1P 3JR

THE CONTRACTOR: WSP UK Limited

#### APPLICABLE FRAMEWORK CONTRACT

This Order Form is for the provision of the Call-Off Deliverables and dated [Insert date of issue]. It's issued under the Research Development & Evidence Framework Agreement reference 30210 for the provision of [Insert name of project].

CALL-OFF SUB-LOT: Lot 7.1. Waste & waste management

**CALL-OFF INCORPORATED TERMS** The following documents are incorporated into this Call-Off Contract. Where numbers are missing we are not using those schedules. If the documents conflict, the following order of precedence applies:

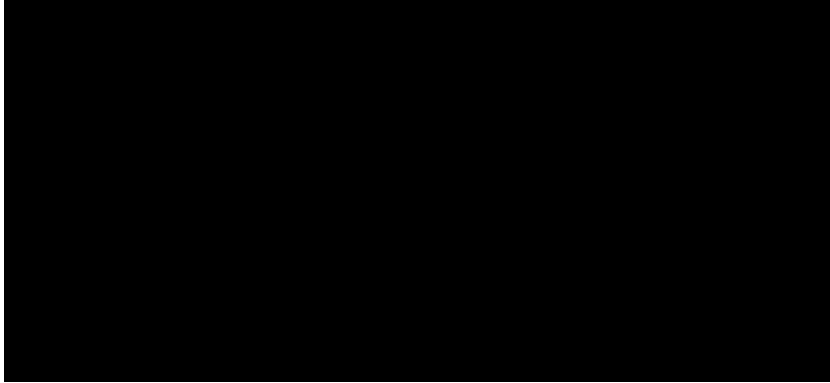
1. Defra Framework Terms and Conditions;
2. Request for Proposal;
3. Proposal;

No other Supplier terms are part of the Call-Off Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

CALL-OFF START DATE: 1<sup>st</sup> November 2024

CALL-OFF EXPIRY DATE: 1<sup>st</sup> May 2024

CALL-OFF INITIAL PERIOD: 6 months



For and on behalf of the Buyer:

