**Call-Off Schedule 20 (Call-Off Specification)**

This Schedule sets out the characteristics of the Deliverables that the Supplier will be required to make to the Buyers under this Call-Off Contract

The Department for Environment Food and Rural Affairs (Defra) has identified a need to review the assets listed on its estate to provide assurance on their completeness. The review is required to verify the accuracy of the assets data captured within the CAFM systems (Maximo) currently held by our FM Service provider, MITIE FM Ltd. This verification shall compare the data held within the system with the physical assets held onsite. Access will be retained by DEFRA and data will be provided by the Building Services Engineering Team

For the purposes of this contract an asset is defined as a piece of Mechanical & Electrical (M&E) equipment as opposed to a premises or site.

BACKGROUND

Defra Group Property has a responsibility for managing a portfolio of buildings for both the Defra Estate and Environment Agency (EA) estate. There are 144 properties on the DEFRA estate, across England, Wales and Scotland and 139 EA properties, all in England.

Defra currently have two main facilities management contracts with Mitie FM Ltd. One contract is for Defra estate, the other for the Environment Agency estate. The Service Provider, Mitie FM Ltd, manages and maintains the asset lists on both contracts.

These contracts are due to expire in 2023/24 and it is a key deliverable for this contract that Defra can fully understand and can, accurately and consistently, verify the assets it has within its estate.

This phase (Phase 2) is for work on the EA estate in the main, except for two laboratory sites on the Defra estate.

REQUIREMENTS

Phase 2 – ASSET VERIFICATION

1. Deliverables

a. Based on findings from phase 1, complete a comprehensive verification of all EA assets

b. Create an asset verification programme, to assess the accuracy and completeness of the property asset registers across the Environment Agency (EA) (DfT contract) by site, building, room and lab etc. Assess and design the requirements necessary to carry out such an exercise.

2. Outputs

a. A spreadsheet or similar electronic document containing all the verified asset data capable of being uploaded into a CAFM systems.

b. A report detailing the findings of the verification exercise. To include all assets and variance from original data.

c. An inductive report should be produced that details the methodology timescales major and minor findings in terms of assets found and the delta between those known, and any other such matrices that help to fully furnish Defra with an understanding of the current asset visibility, recommendations and an executive summary along with a presentation for dissemination to all relevant stake holders

d. A report detailing any changes needed to ensure a consistent classification and recording of assets across both asset registers and Planned Preventative Maintenance schedules

Delivery of the proposed plan (created within phase 1) and therefore concluding phase 2 is required by end of March 2022. Should the completion date of 31 March 2022 be reached before the work required under the contract has been completed Defra reserve the right to decide whether to allow work to continue or not.

It will be necessary to verify the asset information that is currently held on the EA contract:

• Records of the existence of a physical asset, collectively known as an asset inventory or asset register;

• Attributes of these assets. Where an attribute is a quality or feature such as a characteristic or inherent part of an asset e.g. make, model, serial number, age, rated capacity;

• Attributes of the asset systems, e.g. capability;

• Location, spatial information, dependencies, and connectivity information - especially in Geographical Information Systems {GIS);

• Logical groupings e.g. systems, equipment types, zones;

• Performance information about the asset. This can be subjective (from experience & knowledge) or objective (from measurements and data). It covers information such as asset reliability, condition and serviceability assessments; (as defined in phase 1)

The completed data set should pass the following tests

• Accuracy - the data is a true reflection of the physical entity it represents;

• Completeness - a complete set of data is available for each asset data record and all assets are recorded;

• Consistency - data is consistent in its definition, rules, format & value;

• Validity - all data held complies with data storage rules;

• Timeliness - Data reflects the current state of an asset and complies with organisational standards for data update timescales;

• Uniqueness - all keys should be unique with no duplication of data - all assets should be recorded once only.

The Environment Agency Contract Maximo systems is as follows:-

REDACTED

1. Constraints

The data collected shall follow the same format as that provided in Phase 1; ie the same nomenclature and asset hierarchy. Current Asset lists for the sites can be found in the Annexes. Updated versions of these lists will be provided on a mutually agreed date prior to initial surveys being undertaken.

REPORTING

Reports, for Phase 2 Asset Verification shall follow the same format as Phase 1.

TIMESCALES FOR WORK

Phase 2 is expected to take around 15 weeks to deliver to ensure completion of all works by end of March 2022.

ACCESS

Access to buildings will be in accordance with DEFRA Control of Contractors processes, supported and managed by the DEFRA Group Property team. Process documentation will be shared as part of contract setup.

Staff will need to have the relevant security clearance which should be CSCS

The Consultant will be expected to adhere to COVID-19 guidance as per Government guidelines and any additional requirements of Defra. The Consultant shall employ sufficient staff to ensure that the services are provided at all times and in all respects to the contract standard. It shall be the duty of The Consultant to ensure that a sufficient reserve of staff is available to ensure project delivery in the event of staff holidays, sickness, or voluntary absence. In any event, only those named and approved personnel will be eligible to work on our projects. Should any additions be required, then this will need to be discussed with the Project Manager for approval.

The Consultant is required to comply with all legal requirements and with DEFRA/Environment Agency health and safety advice and guidance when carrying out work under this contract. This will be provided as part of contract setup and reviewed on site attendance.

The Consultant shall demonstrate they have the correct skills, experience, and knowledge to undertake the work effectively and safely. The Consultant shall carry out Health and Safety internal audits to ensure competence of staff and their supply chain.

Management and Review

Review Meetings

Review meetings will be scheduled with the project manager REDACTED, initially on a weekly basis and reviewed as the programme progresses. The Consultant is expected to attend review meetings to discuss progress and/or issues that have arisen. Meetings will be held through MS Teams initially though there may be a need for subsequent face to face reviews.

Account Management Roles & Responsibilities

The Consultant must provide a named Account Manager and nominated deputy to hold responsibility for the account who will be available for regular review meetings and act as escalation point for any service.

As part of Phase 2 the Consultant must provide a service plan to coordinate all service visits and reporting requirements for agreement with the contract manager and project lead. This should consist of a list of sites as given in the annex below and a proposed date and time scale (days) for delivery

Defra will provide a single Contract Manager to deal with any issues or escalations surrounding the delivery of the contract. The Contract Manager will be a representative from our National FM Contracts Team supported by a Project Management Lead from the Building Services Engineering Team

Annex A – includes information such as each GIA - REDACTED

Annex B – asset list including PPM information - REDACTED

Annex C – site contact information - REDACTED

Annex D – Site information - REDACTED