



**Crown
Commercial
Service**

**CALL OFF ORDER FORM FOR MANAGEMENT CONSULTANCY
SERVICES**

THE PROVISION OF CONSULTANCY FOR CAPABILITY ANALYSIS

TO

THE CABINET OFFICE

FROM

ERNST & YOUNG LLP

CONTRACT REFERENCE CCCC20B46

FRAMEWORK SCHEDULE 4

CALL OFF ORDER FORM

PART 1 – CALL OFF ORDER FORM

SECTION A

This Call Off Order Form is issued in accordance with the provisions of the Framework Agreement for the provision of **Management Consultancy Services** dated **04 September 2018**.

The Supplier agrees to supply the Services specified below on and subject to the terms of this Call Off Contract.

For the avoidance of doubt this Call Off Contract consists of the terms set out in this Call Off Order Form and the Call Off Terms.

Order Number	To be completed post Contract award
From	The Cabinet Office ("CUSTOMER")
To	Ernst & Young LLP ("SUPPLIER")
Date	27 November 2020 ("DATE")

SECTION B

1. CALL OFF CONTRACT PERIOD

1.1.	Commencement Date: 16 November 2020
1.2.	Expiry Date: 29 January 2021. It is expected that the work will be completed within 8 weeks but two weeks have been added to take in to account the Christmas period.

2. SERVICES

2.1.	Services required: See Annex A Statement of Requirements
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3. PROJECT PLAN

3.1.	Project Plan:		
	Milestone/Deliverable	Description	Timeframe or Delivery Date
	1. Analysis	Review and analyse core information	No later than week 3

	2. Evaluation and framework	Evaluate and produce reference framework for operating models including possible gaps and opportunities for expert support. Testing key assumptions with stakeholders	No later than week 6
	3. Recommendation	Finalise report	No later than week 8

4. CONTRACT PERFORMANCE

4.1.	Standards: In Clause 11 of the Call-Off terms			
4.2	Service Levels/Service Credits: Not applied			
4.3	Critical Service Level Failure: Not applied			
4.4	Performance Monitoring:			
	KPI/SLA	Service Area	KPI/SLA description	Target
	1	Delivery	Summary report of core capacity and capability by department and function – visually represented	90%
	2	Delivery	Summary report on salary returns identifying key themes and challenge areas	90%
	3	Delivery	Recommendations for maturing capability blueprint by department and function	90%
	4	Delivery	Opportunities for the central function to lead on expert advice where any gaps are identified	80%
	5	Updates	A weekly update on progress	90%
4.5	Period for providing Rectification Plan: In Clause 39.2.1(a) of the Call Off Terms			

5. PERSONNEL

5.1	<p>Key Personnel:</p> <p>Customer Redacted</p> <p>Supplier Redacted</p>
5.2	<p>Relevant Convictions (Clause 28.2 of the Call Off Terms): In Clause 28.2 of the Call Off terms</p>

6. PAYMENT

6.1	<p>Call Off Contract Charges (including any applicable discount(s), but excluding VAT): Redacted</p> <p>For the avoidance of doubt, the contract value shall not exceed £40,300.00 Ext Vat. These rates are to remain firm for the duration of the contract.</p>
6.2	<p>Payment terms/profile (including method of payment e.g. Government Procurement Card (GPC) or BACS):</p> <p>In Annex 2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)</p> <p>Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.</p> <p>Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.</p> <p>Invoices should be submitted to: Redacted</p>
6.3	<p>Reimbursable Expenses:</p> <p>No expenses are envisaged in the delivery of this call-off contract.</p> <p>Travel However, the Customer agrees that Supplier may charge for travel expenses except for Customer locations listed below:</p> <ul style="list-style-type: none"> • Redacted <p>Other Customer agrees that the Supplier can charge costs associated with secure transportation (to and from home locations of Customer Personnel in the UK) of Cabinet Office IT equipment, if this is not covered by the Customer.</p>
6.4	<p>Customer billing address (paragraph 7.6 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)): Redacted</p>
6.5	<p>Call Off Contract Charges fixed for (paragraph 8.2 of Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p>

	For the full duration of the Contract term
6.6	Supplier periodic assessment of Call Off Contract Charges (paragraph 9.2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)) will be carried out on: Not applied
6.7	Supplier request for increase in the Call Off Contract Charges (paragraph 10 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)): Not permitted

7. LIABILITY AND INSURANCE

7.1	Estimated Year 1 Call Off Contract Charges: £40,300.00 exc. VAT
7.2	Supplier's limitation of Liability (Clause 37.2.1 of the Call Off Terms); Subject to Clause 37.1 (Unlimited Liability), Redacted
7.3	Insurance (Clause 38.3 of the Call Off Terms): In Clause 38.3 of the Call Off terms

8. TERMINATION AND EXIT

8.1	Termination on material Default (Clause 42.2 of the Call Off Terms): In Clause 42.2.1(c) of the Call Off Terms
8.2	Termination without cause notice period (Clause 42.7 of the Call Off Terms): In Clause 42.7 of the Call Off Terms
8.3	Undisputed Sums Limit: In Clause 43.1.1 of the Call Off Terms
8.4	Exit Management: Not applied

9. SUPPLIER INFORMATION

9.1	Supplier's inspection of Sites, Customer Property and Customer Assets: Not applied
9.2	Commercially Sensitive Information: Not Applied

10. OTHER CALL OFF REQUIREMENTS

10.1	Recitals (in preamble to the Call Off Terms): Recitals B to E Recital C - date of issue of the Statement of Requirements: 8 October 2020 Recital D - date of receipt of Call Off Tender: 21 October 2020
10.2	Call Off Guarantee (Clause 4 of the Call Off Terms):

	Not required
10.3	Security: Supplier Personnel will have minimum of BPSS Security Clearance. Customer will sponsor Supplier Personnel for clearances required above the BPSS level (e.g. CTC, SC).
10.4	ICT Policy: The Customer will provide (and transport) Cabinet Office IT to the Supplier to undertake this call-off contract. In turn, the Supplier Personnel will comply with the Customer's ICT Policy.
10.6	Business Continuity & Disaster Recovery: Not applied
10.7	Protection of Customer Data (Clause 35.2.3 of the Call Off Terms): In Clause 35.3 of the Call Off Terms The following clauses 1-3 shall also apply: Redacted
10.8	Notices (Clause 56.6 of the Call Off Terms): Customer's postal address and email address: Redacted Supplier's postal address and email address: Redacted
10.9	Transparency Reports Not Applied
10.10	Alternative and/or Additional Clauses from Call Off Schedule 14 and if required, any Customer alternative pricing mechanism: Not applied
10.11	Call Off Tender: See Annex B
10.12	Publicity and Branding (Clause 36.3.2 of the Call Off Terms) In Clause 36.3.2 of the Call Off terms
10.13	Staff Transfer Annex to Schedule 10, List of Notified Sub-Contractors (Call Off Tender).
10.14	Processing Data Call Off Schedule 17

Contract Reference:	CCCC20B46
Date:	27 November 2020
Description of Authorised Processing	Details
Identity of the Controller and Processor	The Parties acknowledge that for the purposes of the Data Protection Legislation the Parties

	are independent controllers under this Framework Agreement
Use of Personal Data	Managing the obligations under the Call Off Contract Agreement, including exit management, and other associated activities,
Duration of the processing	For the duration of the Framework Contract plus 7 years.
Nature and purposes of the processing	
Type of Personal Data	<p>Full name</p> <p>Workplace address</p> <p>Workplace Phone Number</p> <p>Workplace email address</p> <p>Names</p> <p>Job Title</p> <p>Compensation</p> <p>Tenure Information</p> <p>Qualifications or Certifications</p> <p>Nationality</p> <p>Education & training history</p> <p>Previous work history</p> <p>Personal Interests</p> <p>References and referee details</p> <p>Driving license details</p> <p>National insurance number</p> <p>Bank statements</p> <p>Utility bills</p> <p>Job title or role</p> <p>Job application details</p> <p>Start date</p> <p>End date & reason for termination</p> <p>Contract type</p> <p>Compensation data</p> <p>Photographic Facial Image</p> <p>Biometric data</p> <p>Birth certificates</p> <p>IP Address</p> <p>Details of physical and psychological health or r</p> <p>Next of kin & emergency contact details</p> <p>Record of absence, time tracking & annual leav</p>
Categories of Data Subject	

FORMATION OF CALL OFF CONTRACT

BY SIGNING AND RETURNING THIS CALL OFF ORDER FORM (which may be done by electronic means) the Supplier agrees to enter a Call Off Contract with the Customer to provide the Services in accordance with the terms Call Off Order Form and the Call Off Terms.

The Parties hereby acknowledge and agree that they have read the Call Off Order Form and the Call Off Terms and by signing below agree to be bound by this Call Off Contract.

In accordance with paragraph 7 of Framework Schedule 5 (Call Off Procedure), the Parties hereby acknowledge and agree that this Call Off Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of the Call Off Order Form from the Supplier within two (2) Working Days from such receipt.

For and on behalf of the Supplier:

Name and Title	Redacted
Signature	Redacted
Date	27.11.2020

For and on behalf of the Customer:

Name and Title	Redacted
Signature	Redacted
Date	27/11/20



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Annex A - Statement of Requirements

Contract Reference: CCCC20B46 - The Provision of
Consultancy for Capability Analysis

1. PURPOSE

- 1.1 The Office of Government Property (the Customer), is part of Cabinet Office (CO). The Customer would like to conduct an analysis of Government Property organisational models, operating models and baseline capacity and capability status across 19 Strategic Assessment Management Plan (SAMP) returns which cover departments and their Arms Length Bodies (ALBs).

2. BACKGROUND TO THE CONTRACTING AUTHORITY

- 2.1 The Property Function operates across departments, delivery organisations, property companies and agencies, with The Customer providing central leadership. The Customer is a key enabler of the work of Government, including the civil and wider public service, and has a critical role in supporting Ministerial priority outcomes. The Customer leads on the relocation of civil service roles out of London/South East, increasing property profession capability, ensuring the government estate is net zero by 2050, driving up the standard of how public facilities are managed, all underpinned by a radical increase in the scale and quality of data analytics for the public sector estate.

3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

- 3.1 The Government Property Function operates across a functional taxonomy model to deliver better outcomes for government. The Customer leads the delivery of these areas from the centre to facilitate a central government strategy and align the function to key departmental priorities. The following diagram refers:



- 3.2 Improvement of strategic asset management is an essential part of corporate activity for government. This has a number of purposes:

- 3.2.1 Public accountability - public plans show that public money is well spent and property assets are being well managed in accordance with government policy.
 - 3.2.2 Professional culture – sharing best practice across government builds capability and helps its various organisations benefit from joint resourcing, training and development.
 - 3.2.3 Promoting sustainability – making sure the government estate supports global efforts for better resource and asset management: using energy and water efficiently, reducing waste and the carbon footprint etc.
 - 3.2.4 Seeking synergies - finding opportunities for mutual benefit and asset efficiency between partners in the government and wider public estate.
- 3.3 Strategic Asset Management Plans (SAMPs) have been in place for three years and form a key part of the planning framework for the government’s property function. They express how the government’s estate will be managed in support of departmental priorities set out in Single Departmental Plans (SDPs) and the policy commitments that all government organisations must take into account within the Government Estate Strategy.
- 3.4 A vital element of SAMP returns is a statement of an understanding of the capability and capacity within a departmental property team to deliver effectively on commitments and the effective roles, skills and operating models anticipated to work towards overtime for better operational performance.
- 3.5 As part of maturing the functional capability of government property The Customer is planning to further develop capability blueprints with departments using the data from the SAMPs as a baseline to begin this work. This over time will define the roles and skills that should make up functional property teams in order to deliver programmes effectively within different property operating models. The ambition is to work towards a model that articulates what the best expected capability and capacity is for a property organisation or team subject to the operating requirements. The Customer will then work with departments to make an annual assessment of their property capability model with supported recommendation to improve on any gaps.
- 3.6 There is a real opportunity to extract more value this year from the SAMP returns, play this back to departmental stakeholders in a user-friendly format and begin to mature the understanding of both function wide capability levels for property and at a local departmental level. This includes opportunities to understand possible areas of development for an expert advice model across the function to address core areas of capability gaps.

4. DEFINITIONS

EXPRESSION OR ACRONYM	DEFINITION
ALB	Means Arms Length Bodies
CO	Means Cabinet Office
OGP	Means Office of Government Property
SAMP	Means Strategic Assessment Management Plan
SDP	Means Single Departmental Plans

5. SCOPE OF REQUIREMENT

- 5.1 This requirement is to accelerate the pace and quality of baseline capability analysis from the SAMPs. The ambition this year is to utilise the SAMP returns to form a richer understanding of departmental and function wide capability, to begin to share knowledge of best practice and set the standard for future operating models in Government Property.
- 5.2 It is recognised this is the first phase in a journey to maturing capability across government and expects this requirement to set the direction for functional maturity in subsequent years.

6. THE REQUIREMENT

- 6.1 The requirement is focussed in three core areas;
- 6.1.1 **The Supplier shall review and analyse the core themes in baseline information by completing the following tasks:**
- 6.1.1.1 Gather and review information provided from Government Departments (strategy documents and supporting data). This includes operating model and plans to changes this, vacancy rate and turnover where available, FTE (Full-time equivalent) in department and ALBs, FTE by property career framework, grade and location, levels of professional qualifications. Data covers c19 departments but is varied in quality and detail.
- 6.1.1.2 A further analysis of salary information for departmental property teams subject to participating departments (return is not mandatory so there may be less data to review) identifying areas of baseline information for core property roles and any significant disparities within this.
- 6.1.1.3 Conduct analysis of information and data sources to understand each Government Department's scope, Operating Model and Organisational Model and Design in detail and to conduct comparison or groupings between

these teams where similarities can be clustered. One important key example here is the need to identify good practice in the intelligent client model where department receive property services for offices from the Government Property Agency.

6.1.2 **The Supplier shall evaluate and produce a reference framework for property operating models including possible gaps and opportunities for expert advice where gaps exist across the function.**

6.1.2.1 Using the insight from the data analysis develop a framework of Operating Model types with benefits and challenges of each, with reference to industry best practice and highlighted or anticipated capability gaps.

6.1.2.2 Evaluate and categorise each Government Department against Operating Model reference framework.

6.1.2.3 Evaluate each Government Department's approach to their Organisational Model including quantitative analysis on FTE numbers and levels.

6.1.3 **The Supplier shall produce a final report with recommendations for progressing capability blueprints in subsequent years. The report must cover individual department and function wide summaries.**

6.1.3.1 Develop findings, recommendations and lessons learnt from across Government Departments to drive change through improved operating models or successful transformations. Present this data in a visual and user-friendly format.

6.1.3.2 Develop findings on possible function wide interventions to strengthen resourcing models (i.e. build, borrow, buy) which may support a centrally led expert advice offer.

6.1.3.3 Validate and socialise report with core stakeholders, refining and iterating as required. Make recommendations for improving the capability return in future years to ultimately move to a tiered assurance system.

7. MANAGEMENT INFORMATION/REPORTING

7.1 The final report will be made up of a more detailed analysis at both a departmental and function wide level.

7.2 A separate report on the departmental salary analysis is required.

8. CONTINUOUS IMPROVEMENT

- 8.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 8.2 The Supplier should present new ways of working to the Customer during monthly Contract review meetings.
- 8.3 Changes to the way in which the Services are to be delivered must be brought to the Customer's attention and agreed prior to any changes being implemented.

9. QUALITY

- 9.1 Intellectual property Rights:

- 9.1.1 The Customer will retain all intellectual property rights.

- 9.2 There are no qualifications required to work on this contract. This work would however benefit from a team that included strong quantitative and qualitative skills and ability to report data visually. This work would also benefit from organisational capability/HR consultancy skills with an understanding of property organisations and operating models.

10. STAFF AND CUSTOMER SERVICE

- 10.1 The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.
- 10.2 The Supplier's staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.
- 10.3 The Supplier shall ensure that staff understand the Customer's vision and objectives and will provide excellent customer service to the Customer throughout the duration of the Contract.

11. SECURITY AND CONFIDENTIALITY REQUIREMENTS

- 11.1 Baseline checks will be suitable for most of this project. At least one of the supplier team shall have SC clearance as they will have access to departmental reports on specialist estate.

12. CONTRACT MANAGEMENT

- 12.1 Attendance at Contract Review meetings shall be at the Supplier's own expense.

13. LOCATION

- 13.1 The location of the Services will be carried out remotely. The expectation is that the Supplier will work in line with Covid-19 restrictions.

Annex B – Call Off Tender

Redacted