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**Call Off Order Form for Management Consultancy Services**

**Asset Management Service Provider to Support the Asset Management Programme**

**To**

**Defence Infrastructure Organisation**

**From**

**Atkins Limited**

**Contract Reference CCCC20A46**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

12/08/2013

**FRAMEWORK SCHEDULE 4**

**CALL OFF ORDER FORM AND CALL OFF TERMS**

**PART 1 – CALL OFF ORDER FORM**

**SECTION A**

This Call Off Order Form is issued in accordance with the provisions of the Framework Agreementfor the provision of Management Consultancy Servicesdated 21st November 2017.

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 confirmed post contract award |
| **From** | Defence Infrastructure Organisation  **("CUSTOMER")** |
| **To** | Atkins Limited  **("SUPPLIER")** |

**SECTION B**

**call off contract period**

|  |  |
| --- | --- |
|  | **Commencement Date**: 7 September 2020 |
|  | **Expiry Date**:  End date of Initial Period 31 August 2022 |

**Services**

|  |  |
| --- | --- |
| **2.1.** | **Services required**:  Call Off Schedule 2 (Services)  See Annex A Statement of Requirements and Enclosures 1 – 15 Redacted |

**PROJECT Plan**

|  |  |
| --- | --- |
| **3.1.** | **Project Plan**: In Call Off Schedule 4 (Project Plan)  See Annex A Statement of Requirements and Enclosures 1 – 15 Redacted |
|

**contract performance**

|  |  |
| --- | --- |
| **4.1.** | **Standards**:  In Clause 11 of the Call Off Terms The support provided should be of sufficient technical quality to cover the full scope of the Statement Of Requirements and provide confidence in the information and robustness in the recommendations.The Supplier’s Quality Management System (QMS) will conform to ISO 9001:2018.The supplier shall ensure all documentation is shared and stored within the DIO domain in line with MOD/DIO document management guidelines. |
| **4.2** | **Service Levels/Service Credits**:  Not applicable |
| **4.3** | **Critical Service Level Failure**:  Not applied |
| **4.4** | **Performance Monitoring:** Redacted |
| **4.5** | **Period for providing Rectification Plan:**  In Clause 39.2.1(a) of the Call Off Terms |

**personnel**

|  |  |
| --- | --- |
| **5.1** | **Key Personnel**:  Customer  Redacted  Supplier  Redacted |
| **5.2** | **Relevant Convictions** (Clause 28.2 of the Call Off Terms):  In Clause 28.2 of the Call Off Terms |

**PAYMENT**

|  |  |
| --- | --- |
| **6.1** | **Call Off Contract Charges** (including any applicable discount(s), but excluding VAT):  Firm Price for Core Activities is contained in Annex C.  Non-Core Price is as follows:  Redacted  The Core Actives for this contract must be carried out by the Supplier. The Supplier must not charge the Authority in excess of Redacted (excluding VAT) for the Core Activities only.  In addition to the Core Activities, the Non-Core Actives shall be based the “Daily Rates Offered” by the Supplier as stated above. The Supplier must not charge the Authority in excess of these stated rates.  The total cost of the Non-Core Activities only shall not exceed Redacted (excluding VAT). The Non-Core activities only will be on a call off basis and therefore the levels of work for these activities only cannot be guaranteed.  For the avoidance of doubt, the total Contract value is based on the overall budget for both the Core and Non-Core activities. Therefore, the total value of this contract shall not exceed Redacted exc. VAT.  All prices, costs and rates shall remain firm for the full duration of this contract, inclusive of all expressed contract extension option provisions |
| **6.2** | **Payment terms/profile** (including method of payment e.g. Government Procurement Card (GPC) or BACS): Invoices to be submitted by email to a central inbox. Redacted This will enable internal review and approval of the amount claimed and the payment of the money owed.Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.MOD standard procedure is 4 weekly invoicing, on receipt of a payment certificate, which when approved can be invoiced.Before payment can be considered, each invoice must be supported by a detailed elemental breakdown of work completed and the associated costs.Expenses to be agreed in advance, a breakdown by resource to be provided with the invoice. Attendance at Contract Review meetings shall be at the Supplier’s own expense.Call-off work packages to be fully specified and costed within core provision and authorised prior to commencement of any work. Call-off payment terms will be on milestone delivery and subject to the invoice approval process. Payment will be via the MOD’s CP&F system. The Supplier must use this system |
| **6.3** | **Reimbursable Expenses**:  Permitted  Expenses to the base location are not permitted, but additional expense claims should be authorised by the Customer and capped in line with the Customer’s policy and rates. |
| **6.4** | **Customer billing address** (paragraph 7.6 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):  redacted |
| **6.5** | **Call Off Contract Charges fixed for** (paragraph 8.2 of Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):  For the full term on the contract including any extension options |
| **6.6** | **Supplier periodic assessment of Call Off Contract Charges** (paragraph 9.2 ofCall 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 |

**LIABILITY and insurance**

|  |  |
| --- | --- |
| **7.1** | **Estimated Year 1 Call Off Contract Charges (including expenses)**:  The sum of Redacted exc. VAT |
| **7.2** | **Supplier’s limitation of Liability** (Clause 37.2.1 of the Call Off Terms);  In Clause 37.2.1 of the Call Off Terms |
| **7.3** | **Insurance** (Clause 38.3 of the Call Off Terms):  In Clause 38.3 of the Call Off Terms |

**TERMINATION and exit**

|  |  |
| --- | --- |
| **8.1** | **Termination on material Default** (Clause 42.2.1(c) of the Call Off Terms)):  In Clause 42.2.1(c) of the Call Off Terms |
| **8.2** | **Termination without cause notice period** (Clause 42.7.1 of the Call Off Terms):  In Clause 42.7.1 of the Call Off Terms |
| **8.3** | **Undisputed Sums Limit**:  In Clause 43.1.1 of the Call Off Terms |
| **8.4** | **Exit Management:**  In Call Off Schedule 9 (Exit Management) |

**supplier information**

|  |  |
| --- | --- |
| **9.1** | **Supplier's inspection of Sites, Customer Property and Customer Assets:**  Not applied |
| **9.2** | **Commercially Sensitive Information**:  The Supplier’s proposal and pricing, any Supplier Personal Data and Supplier Background IPR shall be classed as commercially sensitive information. |

**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:9 July 2020  Recital D - date of receipt of Call Off Tender: 10 August 2020 |
| **10.2** | **Call Off Guarantee (Clause 4 of the Call Off Terms):**  Not required |
| **10.3** | **Security**:  Short form security requirements shall apply.  SAL ref. Redacted, as completed as part of the Tender return, must be adhered to throughout the contract. The Supplier shall confirm in its proposal the level of clearance for all personnel to be involved in the Project. All personnel involved in the project shall have BPSS clearance before starting. In addition, all personnel involved shall have, or be willing to achieve Security Check clearance (SC) vetting.Care is to be taken in the production of documentation, and in associated correspondence, to ensure that sensitive information is classified/protectively marked appropriately, and that no information classified OFFICIAL/OFFICIAL SENSITIVE/SECRET or above is stored or transmitted on systems not cleared to the appropriate security level. A Security Aspects Letter (SAL) will be provided by the security advisor of the unit to ensure that sensitive data is handled in the appropriate format.If there is any doubt over the correct classification of information advice is to be sought before it is included in correspondence from the project lead. Care is also to be taken to ensure that information received from other parties, is not assumed to be correctly classified if that appears to be at odds with other direction. Again, advice is to be taken if there is any doubt.MOD assets such as laptops, passwords, documents and access to programme document storage sites will be provided to those staff that are suitably cleared (minimum Baseline Personnel Security Standard) and in the Need to Know. They remain the property of the MOD. It is the supplier’s responsibility to ensure that access is limited to cleared personnel, and that staff are educated in the requirements of the [Government Classification Scheme](https://www.gov.uk/government/publications/government-security-classifications). MOD property is to be secured in a locked container or cupboard when not in use, and access to the storage is to be strictly controlled and limited to those that have been issued passwords for said devices. In the event of a security breach, of any severity, DIO is to be informed immediately.The core team of the Supplier is required to complete all MOD mandatory training (this will take each member of staff 1 day to complete per annum).Cyber Security. MOD have conducted a Cyber Risk Assessment for the Contract ref: Redacted. The Supplier has completed a Supplier Assurance Questionnaire (SAQ) which forms part of the Defence Cyber Protection Partnership (DCPP) Cyber Security Model. The SAQ allows the Supplier to demonstrate their compliance with the controls required for a contracts Cyber Risk Profile.Suppliers are required to complete a Risk Assessment for this Sub-contract, and your suppliers will need to complete SAQs in response to that. This flow-down continues until the cyber Risk Profiles becomes Not Applicable or there is no further sub-contracting.Refer to: Redacted |
| **10.4** | **ICT Policy:**  Key contractor staff will be issued with MOD Laptops. Any Official and all project documentation including analysis, data, modelling and insights shall be retained on MOD network in accordance with MOD file structure guidance and not emailed or otherwise transferred to contractor held systems without express permission. See DEFCON 611 regarding Government Furnished Equipment supplied |
| **10.5** | **Testing**:  Not applied |
| **10.6** | **Business Continuity & Disaster Recovery**:  Not applied  **Disaster Period**:  For the purpose of the definition of “Disaster” in Call Off Schedule 1 (Definitions) the “Disaster Period” shall be N/A |
| **10.7** | NOT USED |
| **10.8** | **Protection of Customer Data** (Clause 35.2.3 of the Call Off Terms):  In Clause 35.2.3 of the Call Off Terms |
| **10.9** | **Notices** (Clause 56.6 of the Call Off Terms):  Customer’s postal address and email address: Supplier’s postal address and email address: Atkins Limited Redacted  DIO Commercial, Redacted |
| **10.10** | **Transparency Reports**  In Call Off Schedule 13 (Transparency Reports) |
| **10.11** | **Alternative and/or additional provisions (including any Alternative and/or Additional Clauses under Call Off Schedule 14 and if required, any Customer alternative pricing mechanism):**  AUTHORISATION BY THE CROWN FOR USE OF THIRD PARTY INTELLECTUAL PROPERTY RIGHTS    Notwithstanding any other provisions of the Contract and for the avoidance of doubt, award of the Contract by the Authority and placement of any contract task under it does not constitute an authorisation by the Crown under Sections 55 and 56 of the Patents Act 1977 or Section 12 of the Registered Designs Act 1949. The Contractor acknowledges that any such authorisation by the Authority under its statutory powers must be expressly provided in writing, with reference to the acts authorised and the specific intellectual property involved. |
| **10.12** | **Call Off Tender**:  See Annex B |
| **10.13** | **Publicity and Branding (Clause 36.3.2 of the Call Off Terms)**  In Clause 36.3.2 of the Call Off Terms |
| **10.14** | **Staff Transfer**  Annex to Call Off Schedule 10, List of Notified Sub-Contractors. |
| **10.15** | **Processing Data**  Call Off Schedule 17   * + 1. The contact details of the Customer Data Protection Officer is:   Redacted   * + 1. The contact details of the Suppliers Data Protection Officer is:   To be confirmed on Contract Award   * + 1. The Processor shall comply with any further written instructions with respect to processing by the Controller.     2. Any such further instructions shall be incorporated into this Schedule.  |  |  | | --- | --- | | **Contract Reference:** | CCCC20A46 | | **Date:** | 7 September 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 Customer shall be the Data Controller and the Supplier shall be the Data Processor. | | 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. | | Type of Personal Data | Full name  Workplace address  Workplace Phone Number  Workplace email address  Names  Job Title  Compensation   |  | | --- | | Tenure Information Qualifications or Certifications | | Nationality | | Education & training history | | Previous work history | | Personal Interests | | References and referee details | | Driving license details | | National insurance number | | Bank statements | | Utility bills | | Job title or role | | Job application details | | Start date | | End date & reason for termination | | Contract type | | Compensation data | | Photographic Facial Image | | Biometric data | | Birth certificates | | IP Address | | Details of physical and psychological health or medical condition | | Next of kin & emergency contact details | | Record of absence, time tracking & annual leave | | | Categories of Data Subject | Current personnel  Contractors/Consultants  Customers  Public officers  Suppliers  Website end users | |
| **10.16** | **MOD DEFCONs and DEFFORM**  Call Off Schedule 15  DEFCON 76 [Contractor's Personnel At Government Establishments [36KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/076.pdf)  DEFCON 90 [Copyright [15KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/090.pdf)  DEFCON 127 [Price Fixing Condition For Contracts Of Lesser Value [21KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/127_1214.pdf)  DEFCON 501 [Definitions And Interpretations [26KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/501_1117.pdf)  DEFCON 503 Formal Amendment to Contract [[16KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/503_1214.pdf)  DEFCON 514 [Material Breach [16KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/514_0815.pdf)  DEFCON 520 [Corrupt Gifts And Payments Of Commission [56KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/520_0518.pdf)  DEFCON 522 [Payment and Recovery of Sums Due [50KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/522_1117.pdf)  DEFCON 529 [Law (English) [11KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/529.pdf)  DEFCON 527 Waiver [[11KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/527.pdf)  DEFCON 530 Dispute Resolution [[16KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/530_1214.pdf)  DEFCON 531 [Disclosure Of Information [26KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/531_1114.pdf)  DEFCON 532A (Edn 09/18) – Protection of Personal Information  DEFCON 534 Subcontracting and Prompt Payment [16KB PDF]  DEFCON 538 [Severability [11KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/538.pdf)  DEFCON 539 Transparency edn 08/13 shall apply.  DEFCON 566 [Change Of Control Of Contractor [36KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/566_1218.pdf)  DEFCON 604 [Progress Reports [12KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/604_0614.pdf)  DEFCON 609 [Contractor's Records [19KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/609_0818.pdf)  DEFCON 611 [Issued Property [26KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/611_0216.pdf)  DEFCON 620 Contract Change Control Procedure [[23KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/620_0517.pdf)  DEFCON 625 [Co-Operation On Expiry Of Contract [11KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/625.pdf)  DEFCON 642 [Progress Meetings [16KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/642_0614.pdf)  DEFCON 647 [Financial Management Information [12KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/647_0419.pdf) and [Financial Management Information Annex A and B [147KB XLS]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/xls/647_ann_0419.xls)  DEFCON 656A [Termination for Convenience – Under £5M [16KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/656A_0816.pdf)  DEFCON 658 Cyber [[64KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/658_1017.pdf)  DEFCON 660 [Official-Sensitive Security Requirements [19KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/660_1215.pdf)  DEFCON 681 [Decoupling Clause - Subcontracting With The Crown [11KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/681.pdf)  DEFCON 703 [Intellectual Property Rights - Vesting In The Authority [25KB PDF]](http://aof.uwh.diif.r.mil.uk/aofcontent/tactical/toolkit/downloads/defcons/pdf/703_0813.pdf)  For the avoidance of doubt, where a DEFCON and Framework condition conflict, the DEFCON shall take precedence.  DEFCONS and DEFFORMS can be found at:  https://www.aof.mod.uk/aofcontent/tactical/toolkit |

**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 | 3 September 2020 |
| **For and on behalf of the Customer:** | |
| Name and Title | Redacted |
| Signature | Redacted |
| Date | 10 Sept 2020 |

**Annex A - Statement of Requirements**

# 

# terms and definitions

|  |  |
| --- | --- |
| **Expression or Acronym** | **Definition** |
| ABC | Annual Budgeting Cycle |
| AM | Asset management |
| AMP | Asset Management Programme |
| AMS | Asset Management System |
| AMSP | Asset Management Service Provider |
| BAU | Business as Usual |
| BIM | Building Information Modelling |
| ISO 19650 | Managing information of whole life cycle of Assets |
| BS1192 | BIM standards. |
| CP&F | Contract Purchasing and Finance |
| CPAC | Cost and Price Analysis Capability |
| DID | Defence Infrastructure Direction |
| FM | Facilities Management |
| GCS | Government Construction Strategy |
| IAM | Institute of Asset Management |
| ISO 55000 | ISO 55000 series of Asset Management standards |
| ISO 55001 | ISO55001 Asset Management- management systems |
| ISOM | Infrastructure Operating Model |
| PB | Programme Board |
| PID | Programme Initiation Document |
| SDI | Strategy for Defence Infrastructure |
| SME | Subject Matter Expert |
| SQEP | Suitably Qualified and Experienced Person |
| SRO | Senior Responsible Officer |
| TLB | Top Level Budget |
| TSOR | The Statement Of Requirements |

## 

# Background to requirement/OVERVIEW of requirement

## The MOD requirement is formed into two elements. Firstly, the provision of **Core services** which are described in section 4 and secondly for the provision of optional **Non-Core services** which are to be agreed on a case by case basis. **Non-Core** services should generally result from the opportunities / benefits that are identified through work completed in the core services. The Core services element will require dedicated resources whilst the non-core will require capability and capacity to be available within the provider organisation to be drawn down as necessary.

## Included in this section 3 is a description of 1) Asset Management, 2) the current MOD AM Maturity Assessment, 3) the current MOD AMSP. Section 4 describes the scope of the future requirement for meeting this TSOR.

## **Asset Management** involves “the coordinated activity of an organisation to realise value from assets” (ISO 55000 3.3.1). The ISO 55000 notes further state that;

### *“Realisation of value will normally involve a balancing of cost, risks, opportunities and performance benefit; and*

### *The term activity has a broad meaning and can include for example, the approach, the planning, the plans and their implementation”*

## Effective Asset Management should have the Anatomy of Asset Management, written by the Institute of Asset Management (IAM) states that *“effective asset management can improve an organisation’s reputation and its ability to;*

## *Operate safely;*

## *Meet its regulatory and statutory obligations;*

## *Evaluate future business strategies for the delivery of differing performance, cost and tolerable risk profiles; and*

## *Significantly reduce the cost of managing assets over their lives.”*

## ISO 55000 provides the Overview, principles and terminology for Asset Management. ISO 55001 provides information relating to the Requirements of Management Systems. The IAM Anatomy of Asset Management and other documentation describes Asset Management in further detail. The IAM Conceptual Asset Management Model is shown in the following diagram.

## 

## The IAM further splits down Asset Management into a series of groups and subjects. These are described in the Asset Management Landscape the summary of which is included in the following diagram.

## 

## The IAM has developed a maturity scale and terminology to define asset management capability / maturity. The maturity scale and associated guidance considers the maturity of 1) the management system (conformance with ISO 55001); and 2) an organisations asset management as defined by the IAMs 39 subjects of the Asset Management Landscape

## The MOD target is to increase our AM maturity and receive key AM benefits. The MOD aims to achieve an AM Maturity Assessment score of 3 over the contract period such that it could be accredited by IAM.

## The MOD formally undertook an **IAM maturity assessment** in 2017

## The MOD has a draft IAM maturity assessment which is based on the expected maturity in September 2020.

## The MOD has begun developing its AM system based on ISO 55001 (see diagram below). Tthe final handover document will be provided in September 2020.

## 

## The overall objective for the AM programme is to support the development of a sustainable affordable estate, through the development and implementation of an Infrastructure Asset Management System (AMS). This will include building the necessary capabilities to support the system and to suitably develop customers and their DIO advisors to create additional value from the MOD estate assets. An AMS is defined as the management system for Asset Management, the function of which is to set the framework for the coordinated activities that an organisation must take to realise value from its assets. In this case, value needs to be defined in terms of how Defence best balances cost, performance and risk in managing the estate.

## The current MOD AM Programme is part of a wider Defence Infrastructure Organisation (DIO) organisational transformation programme, Future DIO (FDIO) phase three. Phase three is the final element of this transformation which builds on the work previously undertaken. This phase contains three distinct areas of work; Capability to Advise, Capability to Deliver and Corporate Capability. The AM Programme is part of the Capability to Advise work stream but has clear links to the other two workstreams. The governance focus is increasingly moving towards Head Office Focus through the Infrastructure Joint Committee.

## The Capability to Advise workstream and the AM Programme comes under the direction of the Director of Strategy and Planning, who chairs the AM Programme Board and has an active involvement in the Programme.

## The AMP PID describes the projects to develop asset management maturity in the ‘Inform’, ‘Advise’, ‘Plan’ spaces of the Defence Asset Management Approach. The PID outcomes are focussed on ensuring that long term capability and infrastructure plans are developed coherently and aligned and that each Annual Budgeting Cycle (ABC) is better informed. In doing this Defence will make more informed decisions leading to better capability and infrastructure outcomes, in turn enabling Defence to meet its objectives. Other benefits of a coherent AMS include:

* Improved financial performance
* Improved risk awareness and management
* Improved services and outputs;
* Demonstrated social responsibility
* Demonstrated compliance
* Enhanced reputation
* Improved organisational sustainability
* Improved efficiency and effectiveness
* Improved understanding of asset performance through improved data and analytics

## Within Capability to Advise there are ten projects of which three form the current AMP. The three projects are shown in the diagram below and described in the following text;

## 

## A7 - Asset Management System (AMS); The creation and deployment of a common and consistent approach to asset management across the Defence estate including business processes, information and governance that are consistent with industry good practice.

## A8 - Asset Management People and Organisation; An organisation design, with roles and accountabilities that provides a professional asset management service. A reducing reliance on SME contractors through knowledge transfer, training and upskilling.

## A9 - Asset Management Capability Development; To support new and improved existing capabilities, data/information capture, analytics, tools, benchmarking, models and insights to support/enable the AMS. Bringing emerging sector innovation and best practice into the Defence infrastructure enterprise. Transferring and embedding these new capabilities into the AMS and Business as Usual (BAU) activity.

## The key deliverables for the projects are described below.

## **A7 - Asset Management System.** A coherent approach to asset management across Defence aligning the work completed on ISOM to industry good practice (ISO 55000) and, with a particular focus on ‘Inform’, ‘Advise’ and ‘Plan, clearly defining the following:

* Processes including key artefacts, roles & responsibilities and enabling systems across the Defence enterprise.
* Clarity on asset management objectives, cascading from key departmental artefacts and applicable across the infrastructure system
* An organisational design for Estates Planning team to support TLBs with their long-term infrastructure plans coherent with capability plans
* Linkages into other areas of the Defence AM Approach i.e. ‘Deliver’.
* Requirements for organisational and people change to be supported by the AM People and Organisation workstream.
* Pilots to ensure successful implementation and embedding of processes.

## **A8 – Asset Management People and Organisation.** Development of the “Asset Management” organisation design and operating model within the infrastructure system and component organisations with a particular focus on the “Strategic Asset Management” capability within Estates Strategy and identifying training needs across to Defence to further professionalise asset management. Includes;

* An organisational design for Estates strategy team to deliver the strategic asset management role
* The methodology to achieve a reducing reliance on SME contractors through the recruitment and upskilling of asset management staff
* A wider asset management training programme to improve the awareness, engagement and participation of Defence staff in asset management.

## **A9 – Asset Management Capability Development.** Development of a series of capabilities to support/enable the AM System and develop greater levels of sophistication to better ‘Inform’ and ‘Advise’ TLBs in the creation of the infrastructure ‘Plan’.



* Capabilities are specifically related to the capture and understanding of cost, performance and risk data to provide a well-rounded view of the estate and enable scenario testing
* Individual capabilities are focussed on developing methodologies that can be further enabled/embedded with supporting tools/software

## Each project has a Project Manager and a Senior Military (1\*) or Senior Civil Service Sponsor. Most projects require external technical support. A core Civil Service AMP team supported by specialist and technical support has been established..

## The intent is that the Defence infrastructure enterprise will implement, embed and mature an AM system that aligns to an international standard (ISO 55000) with a consistent approach across all elements of the Infrastructure Operating Model (ISOM). This approach follows established best practice enabling Defence to benefit from the experience of other public / regulated bodies such as the utilities (water & electricity), rail as well as maintainers of complex and high-risk infrastructure.

## The initial focus of the programme has been to provide support to TLB’s Infrastructure branch decisions, balancing cost, performance (including environmental impact) and risk based on evidence, insights and industry experience. This is across the TLB’s portfolio, at establishment, asset and component levels. The AMSP will now support the Programme to evolve and support all areas of AM across DIO (including supporting Industry Providers) ensuring processes for risk management, prioritisation, and programming are coherent and that asset information is recognised as a key resource and fully exploited to support decision making and performance of delivery. It is expected that the AM vision will increase to encompass all AM groups and subjects, asset classes and across the entirety of the Defence Enterprise.

## The AMP aims to ensure programme success through enhancing and embedding capabilities within Defence meaning that each Annual Budgeting Cycle is better informed than the previous one. This includes creating the culture of continuous improvement to carry on after formal Programme completion, as Business as Usual (BAU).

## The Programme Benefits are listed in the following table. The activities within the current programme are targeting improvements in the overall benefits that allow overall maturity to increase. Achieving these benefits is a key tenant of the AMP and should be a key factor in setting the context for the further development / delivery.

|  |  |
| --- | --- |
| **Prog Area** | **Benefits** |
| **AM SYSTEM** | * Deliver a coherent approach to asset management across Defence aligning the work completed on ISOM to industry good practice * Set the strategic context in which the Defence Estate is to develop in order to meet Defence objectives * Support to Infrastructure Planning and the definition of programmes of work * Support the future capabilities and the effective asset management of the defence estate with the capture, update, maintenance and population onto MOD systems of data and information * Provide a means of monitoring, auditing and assuring the AM system as a whole to embed processes, ensure adoption by role holders and maintain the effectiveness of the AM System |
| **PEOPLE** | * Enable DIO resourced to deliver professional asset management advice as part of the defined AM System * Facilitate that Defence has the right skills to deliver the outputs of the AM System and meet Defence objectives. * Guide asset management as a professionalised function within DIO and across Defence in line with the Infrastructure Function. |
| **COST** | * Drive a consistent insight into both the running cost and intervention cost of assets to Level 2 as a minimum and Level 3/4 where possible prior to CPAC * Ensure cost outputs are used in balancing Cost, performance and Risk supporting/enabling better asset investment planning as part of the AM system |
| **PERFORMANCE** | * Insight into the utilisation of assets on the estate informing longer term planning * Improved understanding of how asset performance impacts Defence outcomes * Performance outputs are used in balancing Cost, performance and Risk supporting/enabling better asset investment planning as part of the AM system |
| **RISK** | * A better understanding of the risks associated with assets by building sophistication into both probability and consequence of failure. * Enhanced Probability of Failure (PoF) to more accurately identify assets requiring more urgent intervention * A more granular view of Consequence of Failure (CoF) to assist in prioritising intervention * Risk outputs are used in balancing Cost, performance and Risk supporting/enabling better asset investment planning as part of the AM system |
| **DATA & TOOLS** | * + A single, definitive and controlled source of reference for asset data and information management. Data standard published including data requirements. * Better alignment to industry best practice standards * Support to Infrastructure Planning and the definition of programmes of work by providing tools and insights that support planning processes and effective decision making * Provide a robust platform for auditable decision making * Data & Tools are used in balancing Cost, performance and Risk supporting/enabling better asset investment planning as part of the AM system. * BIM development beyond Capital to enable digital twin. |

# scope of requirement



## The Supplier will support the delivery of the AM programme (including BIM maturity) over the next 2 years. The contract will be in place on the 1 September 2020 and run for 2 years to 31 August 2022.

## The AMP has been established with a core civil service programme team supported by specialist and technical support (currently PA Consulting and through manpower substitution resourcing). An external provider with the right blend of skill and experience of introducing, embedding, improving and delivering AM systems into similar Infrastructure and Property enterprises will be needed until MOD develops such that it can standalone; this is expected to take 2 years.

## The Supplier must have a wide cross-sector experience of Asset Management programmes within complex Infrastructure and Property Enterprises that are large national scale and enterprises undergoing business transformation. In particular they must be able to:

1. Demonstrate knowledge and experience of delivering large specialist Asset Management improvement Programmes and Projects, and programme/project management, taking into account public sector requirements. This should include experience in delivering at all stages of the asset lifecycle.
2. Demonstrate knowledge and experience of delivering Asset Management and Business transformation in the area of large national scale Portfolios, Programmes and Projects, taking into account public sector requirements.
3. Demonstrate understanding of the assessment methodology for the IAM Maturity Assessment in the context of Infrastructure and Property enterprises and have a demonstrable track record of delivering the assessments, plans of actions to improve overall maturity and successful delivery of those plans.
4. Provide expertise in the full range of AM disciplines (as defined by the AM landscape in the context of an Infrastructure and Property Enterprise). Should be able to demonstrate competence in terms of experience and alignment to industry and civil service competency frameworks. The AMSPs staff should be appropriately focussed upon delivery of the AMP.
5. Have a ‘tried and tested’ methodology and range of tools, including those necessary to engage effectively with stakeholders, to ensure that programmes and projects are delivered. These should be underpinned by the principles of evidential data and value for money.
6. Expert knowledge of the Institute of Asset Management Anatomy (IAM) is essential including the project management and technical skills to deliver projects across the breadth of the Asset Management Landscape.
7. The ability to combine customer, industry and potentially regulator perspectives to develop robust solutions and engage effectively with the business and Defence stakeholders. The Supplier should have demonstrable experience of working in large complex property and infrastructure environments.
8. The Supplier will need to be able to support ensuring programme success through enhancing and embedding capabilities within Defence. This includes creating the culture of continuous improvement to carry on after formal Programme completion, as Business as Usual (BAU).

## The Supplier is required to deliver at the Programme and Project level and to integrate into the existing MOD team and enduring capability. The procurement of the Programme Level AMSP is to support the Asset Management Programme in two parts (**Core** and **Non-Core**) as described below.

**Part 1: Core Tasks**

## The Supplier shall provide the core tasks as part of the firm price element of this Statement of Requirements. These core tasks are designed to ensure that 1) Mobilisation, Handover and Due Diligence occur, 2) AM Maturity is measured and developed,3) an AM system and organisation is measured and developed, 2 & 3) Activities to improve the AM maturity and the system are delivered, 4) AM Project Plans are developed for subjects and groups that need to be improved, 5) appropriate AMP programme management occurs and that 6) the current AMP Projects continue to completion. In addition, there is a requirement to review current BIM delivery and develop a plan to take forward.

## The Supplier will need to provide the following services over a period of 2 years. By this point it is anticipated that MOD will have created the capability to standalone.

## The AMP core team will become conversant with the wider programme Future DIO and other/wider MOD and TLB specific change programme(s) and will ensure that development is coherent across the Asset Management System including where DIO is not the infrastructure delivery or maintenance agent. For the core tasks the Supplier should define and monitor/manage interface with other DIO initiatives. The Supplier will be responsible for producing communications required to embed any of its tasks and providing presentations to the AM Board and Steering Group. The Supplier will work to ensure that its projects/task result in products/tasks that are embedded into the BAU areas of DIO. They will provide the relevant presentational and guidance documents to allow this to occur.

## **Mobilisation, Handover and Due Diligence.** The Supplier will be required to complete due diligence on the current AMP. This will result in a review of AM Maturity and the AM Operating system. Furthermore, the current projects will be accepted from the outgoing Supplier; reviewed and the project plans, deliverables and milestones reviewed and updated.

|  |  |
| --- | --- |
| 1 | The Supplier is required to mobilise their core team in place within 2 weeks of Contract Award. This includes completing handovers with the outgoing AM Supplier and completion of the Contract Management Plan with DIO. |
| 2 | Review AMP PID, current programme plan and vision , schedule and the Handover Document and then confirm progress and areas/recommendations to update. This should be presented as a Board report within 3 months of Contract Award. |
| 3 | Review AMP RAID log and confirm areas/recommendations to update. This should be presented as a Board report within 1 month of Contract Award. |
| 4 | Mobilise to continue towards the completion of the projects that the outgoing Supplier was completing (these are listed below in the AM Projects section) |

## **AM Maturity Assessment.** The Supplier is required to provide IAM Maturity Assessments to the MOD for discussion and approval, train DIO staff in the completion of AM Maturity Assessments and handover a working process and documentation for the MOD team to conduct future AM Maturity Assessments.

|  |  |
| --- | --- |
| 1 | Conduct AM Maturity Assessment in accordance with the IAM process within 2 months of contract award |
| 2 | Conduct AM Maturity Assessment update in accordance with the IAM process within 12 months of contract award |
| 3 | Conduct AM Maturity Assessment update in accordance with the IAM process within 23 months of contract award |
| 4 | Train up to 5 staff in the process of conducting AM Maturity Assessment within 12 months of contract award |
| 5 | Handover working process and documentation for the MOD team to conduct future AM Maturity Assessments. |

## **AM Operating Model and AM Programme Team Organisation.** The Supplier is required to review and describe the current operating model and the DIO team that manages the AM Programme. The Supplier is also required to compare this to other AM organisations who openly provide their scores for the purposes of allowing MOD to gain good practice from them. The Supplier is to make recommendations as to the development of theAM Operating Model and AM Programme Team Organisation. Advice and guidance on alignment to ISO 55000 should be provided in the context of a complex operating environment where the physical asset is supporting a wider capability output. The supplier is required to deliver IAM accredited training as detailed in the table below.

|  |  |
| --- | --- |
| 1 | Review and describe the current MOD Infrastructure AM Operating Model and Organisation. This should be completed within 3 months of contract award. |
| 2 | Assess the AM Operating Model and Organisation against the AMP Benefits and AM Maturity Assessment and against other AM organisations. This should be completed within 6 months of contract award. |
| 3 | Provide options for and a recommended target MOD wide AM Operating Model following presentation of the review and assessment. This should be justified against the AMP Benefits; the AM Maturity Assessment and other similar organisations and the recommendations should be robust enough to support the production of a business case for those staff. This should be completed within 6 months of contract award. |
| 4 | Provide options for and a recommendation for the operating model, size and composition of the Estate Strategy AM Programme Team into the future. This should be justified against the AMP Benefits; the AM Maturity Assessment and other similar organisations and the recommendations should be robust enough to support the production of a business case for those staff. This should be completed within 6 months of contract award. |
| 5 | Provide Project Plans to change the MOD Infrastructure AM Operating Model to achieve the AMP Benefits and improved Maturity ratings. |
| 6 | Building on the completion of the Level 1 processes the Supplier is required to manage TLBs in developing the Level 2 Strategy and Plans processes and RACI within 3 months of contract award ensuring common operating procedures. Create L2 processes on behalf of TLBs in common template for publication. |
| 7 | To complete a review of the training / mentoring required to assist the AM Programme Team. Provide a plan to embed AM within the AM Programme Team such that it can expand its AM capability. To be assessed at 4 months and reviewed at 18 months from contract award. |
| 8 | Design and deploy a defence specific short online awareness training course within 4 months. This to be reviewed and updated at the 12 month point to ensure that the content remains current and the course continues to meet the needs of the business. |
| 9 | Design and deploy a defence specific short update online awareness training course which reflects developments in processes and other programme outputs, this should be completed by Jan 22. |
| 10 | Deliver IAM accredited courses: Foundation course (6 x 25 pax), Certificate course (12 x 15 pax) and Diploma (2 x 12 pax) |
| 11 | To develop and agree a skill transfer plan, jointly with the People & Organisation project manager, which will ensure that DIO staff increase their knowledge and skills to enable DIO to become self-sufficient by the end of the contract. The plan should be complete to be approved at the Programme Board in month 6 of contract commencement. |
| 12 | To lead and produce the MOD AMS governance framework for Infrastructure within 12 months of contract award. This will require engagement across the DIO, TLBs and MOD Head Office |
| 13 | To complete a review of DIO BIM maturity including the key documents and controls (Exchange Information Requirements, BIM Manual, training etc.) and current resourcing model. Provide a plan to enhance BIM benefits and embed within DIO and commercial arrangements within 3 months of contract award. This should be aligned with the other BIM requirements later in this document. |

## **AM Project Plans**. The Supplier is required to provide [ISO 55001] AM Project Plans for the delivery of projects to deliver on the key benefits sought by the AMP, those that enhance the AM Maturity Assessment and/or the AM Operating Model. The Supplier will train DIO staff in the development and completion of AM Project Plans and handover a working process and documentation for the MOD team to conduct future AM Project Plans. Project plans should be developed (or in the case of MOD produced plans the Supplier should endorse) with the view that most effective delivery could be through 1) tasking parts of DIO to undertake the activities, 2) for them to be undertaken by other suppliers or 3) for them to be called off under part 2 non-core tasks.

|  |  |
| --- | --- |
| 1 | Provide project plans against all subjects and groups of the IAM Asset Landscape. These should be sufficiently scoped, and benefits / outcomes defined so that they can be delivered by DIO or by the Supplier as part 2 non-core tasks. This should be completed for all subjects and groups within 3 months of contract award.  In presenting these individual projects they should be ranked in conjunction with the MOD for the AMP benefits and improvement to AM Maturity and Operating Model that they will achieve. |
| 2 | Following the development of the project plans to provide proposals (including quality and time measures) to deliver part 2 non-core tasks. These proposals should be priced in accordance with the Price section of this TSOR. |
| 3 | Note as part of the non-core element of the TSOR there will be a requirement to provide oversight and assurance to the delivery of Project Plans including where delivery is undertaken in-house within DIO (e.g. DA&I) or through other Providers (e.g.) FIDS contractors. |

## **AMP Programme Management**. The Supplier is required to provide input to the AMP in accordance with the deliverables below. Deliverables should be provided in the format agreed with MOD.

|  |  |
| --- | --- |
| 1 | Provide Monthly report on all activities under supplier control to Programme Manager in support of Working Groups and Programme Boards. |
| 2 | Provide attendees to Monthly Programme Boards and Working Groups |
| 3 | Provide attendees for meetings relating to the deliverables in part 1 – core services. Allow for weekly informal meeting with Programme Lead and Sponsor, monthly DIO internal programme update meeting, Monthly TLB Working Group, Monthly Programme Board. |
| 4 | Provide input to the AM Programme RAID logs (input is for those areas in which the Supplier is responsible]. This would take the form of a monthly update. |
| 5 | To provide a monthly update on changes/progress with AM at a policy level and in other similar organisations. This should enable the MOD to benefit from changing AM policy and standards and understand opportunities and learn lessons from other organisations. This would take the form of a short report submitted monthly. |

## **AMP Project Management**. The Supplier is required to provide resource to the current projects within the AMP in accordance with the deliverables below.

|  |  |
| --- | --- |
| 1 | Utilisation – supply resources and conduct outstanding site visits and develop insights by 31st March 2021. |
| 2 | Understanding Costs & Faults & Defects (supporting Probability of Failure). Building on current work, support DA&I in the testing of hypothesis by providing property expertise in understanding classifications and taxonomies used in Industry data within DIO data warehouse. Provide guidance on interpretation of patterns from property performance and FM experience to provide insights on asset performance. Complete hypothesis testing and insight generation within 6 months of contract award.  Provide plan on how to take hypothesis findings into developing Scenario Planning through integration with Consequence of Failure project, within 6 months of contract award.  Note as part of the non-core element of the TSOR there will be a requirement to ensure alignment with Cost and Price Analysis Capability (CPAC) project throughout to prevent duplication of effort and to gain greater or accelerated benefits. |

## **Building Information Modelling.** The Government Construction Strategy (GCS) 2016-20 sets out the Government’s plan to develop its capability as a construction and property client and act as an exemplary client across the industry. Embedded within the Asset Management capability is the requirement to incorporate Building Information Modelling (BIM) as business as usual.

## DIO has separately developed its initial BIM requirements across its Non-Sensitive Capital Phase projects and now requires AMSP support to:

### Adapt, implement and embed those processes and procedures across the whole life cycle of all infrastructure assets, for both Capital and Operational delivery areas;

### Review, Improve, implement and embed processes and procedures based on best practice;

### Provide guidance on the interoperability of BIM Information standards and their subsequent procurement;

### Provide guidance and support in the procurement of MOD’s specific Asset Information Requirements in support of the Authority’s Asset Management aspirations.

### Ensure coherence of BIM and asset information requirements within property provision and maintenance procurement and evolve both DIO and Industry’s thinking on BIM and BAU

### Advise on the movement to BS EN ISO 19650 suite of standards from BS1192 suite in support of BIM and digital Asset Information Management

### Advise on the specification and evaluation of future procurement exercises specific to BIM Information Delivery Plans, BIM Execution Plans and associated BIM Maturity Assessments. Support to the maintenance and control of the standard design library

### Advise on the deployment and interoperability between DIO system architecture (including Data Warehouse, Common Data Environment and Computer Aided Facilities Management applications) and Industry Provider systems including utilisation and development of COBie across Capital and Operations phases of asset lifecycle

## In order to deliver these BIM objectives, the MOD requirement is for the Supplier to complete two initial tasks which are expected to lead to further tasks to be called off in the Non-Core Tasks. These two initial tasks are;

|  |  |
| --- | --- |
| 1 | Review the current BIM Information Delivery Plans, BIM Execution Plans and associated BIM Maturity Assessments. This should Include a review of current BIM resourcing, BIM Manual and training materials. This should be completed within 3 months of contract award. |
| 2 | Provide plan for enhancement of BIM delivery and maturity within DIO. Explain the plan clearly in the context of the benefits that MOD could realise (related to the costs to achieve those benefits). This should be in a collaborative manner with the MOD such that the DIO BIM lead supports the plan. This should be completed within 6 months of contract award. |

## **AMSP Handovers.** The Supplier is required to integrate into the MOD AM Programme Team. All information should be shared throughout such that handover is more effective. The Supplier is required to handover all tasks and supporting documentation as described above. The AMSP is to embed suitable skills and deliver transfer plans to enable MOD to complete its Asset Management within MOD resources.

**Part 2 – Non-Core Tasks:**

## Non-Core tasks are those that have yet to be formally agreed and prioritised by the AMP. In order to deliver the improvements in AM Maturity and the AM benefits a programme of these will need to be delivered.

## In addition to the core requirements described in part 1, the AMSP is expected to provide additional resources to undertake discrete and defined projects. In particular this includes those items of additional project packages developed and costed within the core requirement. In addition, it may include further packages that relate to the review of asset type specific activities or to specific changes in Asset Management standards (such as changes from developing Environmental Standards).

## DIO retains the right to decide whether non-core tasks are delivered within DIO, by other suppliers or under this contract. The Supplier shall not have exclusive rights to undertake the non-core tasks.

## Furthermore, DIO may ask the Supplier to provide resource to supplement its team. This resource will be in the form of Project Managers or Asset/Property Management Subject Matter Experts. These resources could be required for all subjects and groups of the AM Landscape.

## Each non-core task will be called off once a clear plan, milestones and deliverables and price have been agreed for them. Pricing will need to be in accordance with the Price section of this TSOR.

# key milestones and Deliverables

## The key milestones and deliverables are described in the tables within section 4

# 

# MANAGEMENT INFORMATION/reporting

## In addition to those items specified in the Core and Non-Core tasks the supplier will deliver the following:

### Weekly reports on progress

### Monthly face to face reviews on progress

### A report to support the Monthly Contract review

### Report on engagements and any agreements with MOD centre, TLB’s, wider DIO beyond S&P and existing Industry Providers where core AM programme team not present.

# volumes

## This is a standalone contract, change management will be managed as per DEFCON 503 (12/14) Formal Amendments to Contract. DEFCONS and DEFFORMS can be found at: Redacted (Registration is required).

# continuous improvement

## The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## The Supplier should present new ways of working to the MOD during monthly Contract review meetings.

## Changes to the way in which the Services are to be delivered must be brought to the MOD’s attention and agreed prior to any changes being implemented.

# Sustainability

## The support provided has an important and enduring role to play in the sustainable development of asset management and should support our commitment to the effective management of our asset base.

## The Supplier will recognise the potential impact on the environment related to the asset management activities, and the approach to whole life evaluation of risks, costs and performance delivered through this programme.

# STAFF AND CUSTOMER SERVICE

## The Supplier shall provide sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service. The Supplier will describe the in-house evaluation process undertaken to demonstrate the selected resources are suitable.

## The Supplier’s staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.

## The Supplier shall ensure that staff understand the MOD’s vision and objectives and will proactively collaborate with the MOD and provide excellent customer service to the MOD throughout the duration of the Contract. The Supplier’s staff will comply with the DIO Values.

## The Supplier to provide an organisational chart along with professional profiles for the proposed resources and rate cards.

## The Supplier will seek prior agreement with the Authority for changes to key SQEP and provide professional profiles for potential replacement resource.

# Behaviours

## Any contract awarded will be on the basis of a fair and open competition, suppliers are expected to carry out their role with equal dedication and commitment as their Civil Service team members, our collective core values are, integrity, honesty, objectivity and impartiality.

### ‘integrity’ is putting the obligations of public service above your own personal interests

### ‘honesty’ is being truthful and open

### ‘objectivity’ is basing your advice and decisions on rigorous analysis of the evidence

### ‘impartiality’ to carry out your responsibilities in a way that is fair, just and equitable and reflects the Civil Service commitment to equality and diversity

## In addition, the Supplier is required to work to the DIO Values. These are;

### **Safety First** – Safety first in everything we do

### **Collaboration** – Working in partnership

### **Integrity** – Doing the right thing, not just the easy thing

### **Agility** – Moving at pace to meet new demands

### **Accountability** – Delivering on your promises

### **Enthusiasm** – Passionate about what we do and spirited in how we do it.

## In addition, the Supplier is to encourage staff to plan DIO/MOD in-house opportunities to deliver improvements, innovation and improved quality and benefits wherever practicable and appropriate.

## Innovation and added value through improved capability, quality and continuous improvement is to be embedded in all project and appropriate programme milestones.

## A Behavioural Charter shall be agreed in mobilisation as part of the Contract Management Plan.

# CONTRACT MANAGEMENT

## The Authority and the Supplier shall be responsible for managing this contract.

## The Supplier is required to attend project progress and contract review meetings on a monthly basis in accordance with CCS terms.

## Monthly progress meetings to review progress against the programme, identify issues, risks and provide the financial forecast.

## A Contract Management Plan (CMP) will be drafted by DIO in advance of contract award and completion of this with the successful bidder will be established as one of the initial deliverables within mobilisation. This document will clearly identify the starting dates, key dates, and completion date and any other relevant information applicable to the works under the contract.

# subcontractor management

## As the Strategic Provider, the Supplier shall ensure fair treatment and payment terms to all sub-contracted organisations and maintain a performance management regime. This will be managed by DEFCON 534 (06/17) Subcontracting and Prompt Payment which the Supplier will be mandated to adhere to.

# Location

## The DIO programme team and Senior Responsible Owner are primarily based at Army HQ, Andover. Principal roles within Data, Analytics & Insight and Regional Delivery are primarily based at DIO Head Office (currently Sutton Coldfield but transferring to Lichfield in 2021). Travel to other UK sites such as London, Wyton, Portsmouth, High Wycombe, Warminster will be as required. Overseas travel is not anticipated in this contract.

## In line with RM3745 requirements, Andover and DIO HQ (currently Sutton Coldfield but transferring to Lichfield in 2021) shall be classed as the primary place of work. Expenses to the primary place of work will not be considered. Additional expense claims should be authorised in advance by the Authority and will be capped in line with the Authority’s policy and rates.

## Contract Review meetings to take place at Army HQ, Andover unless stated otherwise.

## **Annex B**

## Redacted