



Crown  
Commercial  
Service

# **RM6168: Estate Management Services Order Form Template**

## **Guidance:**

This Order Form, when completed and executed by both Parties, forms a Call-Off Contract from as outlined in section 4.3 of Framework Schedule 1 and Annex A of Framework Schedule 1 only.

You can complete and execute a Call-Off Contract by using an equivalent document or electronic purchase order system. If an electronic purchasing system is used, the text below must be copied into the electronic order form.

You must complete Part 1 of the Order Form Template to provide the information needed to populate a Call-Off Contract. Part 2 of the Order Form Template incorporates documents into the Call-Off Contract to create a complete set of terms. Part 2 also makes choices for some elections which are required to create a complete set of terms in a way that CCS expects to be most appropriate for Call-Off Contracts created using this Order Form.

If you want to add or amend any aspect of any of the terms or elections incorporated into the Call-Off Contract by Part 2 of this Order Form, you must use the box below marked "Call-Off Special Terms". Call-Off Special Terms rank ahead of the incorporated terms and elections.

You must complete Annex 1 - Processing Personal Data as part of completing the Order Form.

## **Order Form Template**

This Order Form is for direct awards for the provision of the Deliverables which form part Framework Contract RM6168: Estate Management Services as outlined in section 4.3 of Framework Schedule 1 and Annex A of Framework Schedule 1 only.

### **Part 1: Buyer and Supplier to complete**

<b>Buyer Name</b>	
<b>Buyer Contact</b>	
<b>Buyer Address</b>	2.3 Redgrave Court Bootle Merseyside L20 7HS
<b>Invoice Address (if different)</b>	<a href="mailto:APinvoices-HAS-U@gov.sscl.com">APinvoices-HAS-U@gov.sscl.com</a>
<b>Buyer's Authorised Representative</b>	
<b>Buyer's Data Protection Officer</b>	

<b>Buyer's Environmental Policy</b>	<a href="https://www.hse.gov.uk/aboutus/howwework/.../environmental-policy.pdf">https://www.hse.gov.uk/aboutus/howwework/.../environmental-policy.pdf</a>
<b>Buyer's Security Policy</b>	<a href="https://www.hse.gov.uk/privacy.htm">https://www.hse.gov.uk/privacy.htm</a>
<b>Security Representative of the Buyer</b>	

<b>Supplier Name</b>	Carter Jonas LLP
<b>Supplier Contact</b>	
<b>Supplier Address</b>	
<b>Registration Number:</b>	
<b>DUNS Number</b>	
<b>SID4GOV ID</b>	
<b>Payment Method</b>	BACS – Purchase Order
<b>Supplier's Authorised Representative</b>	I
<b>Supplier's Contract Manager</b>	
<b>Supplier's Data Protection Officer</b>	
<b>Security Representative of the Supplier</b>	
<b>Commercially Sensitive Information</b>	None

<b>Framework Ref</b>	RM6168
<b>Call-Off Lot</b>	Lot 1
<b>Estate Management Services</b>	<ul style="list-style-type: none"> <li>• moveable equipment asset management</li> <li>• acquisition of land, freehold or leasehold property (includes letting or other commercial arrangements)</li> <li>• pre-acquisition survey or more detailed technical due diligence inspection and report for freehold or leasehold property.</li> <li>• acquisition outline feasibility study</li> <li>• rent reviews lease breaks &amp; lease expiries</li> <li>• lease renewals &amp; lease regear</li> </ul>

	<ul style="list-style-type: none"> <li>disposal of land, freehold and leasehold property (sale, transfer, license, lease or other disposition (including any sale and leaseback transaction) of any property by any Person, including any sale, assignment, transfer or other disposal including a premium payment)</li> <li>lease consents</li> <li>lease surrender &amp; regrant</li> <li>dilapidations</li> <li>Wayleaves &amp; easements</li> <li>licences for alteration and landlords consent</li> <li>environmental surveys, studies and strategy</li> <li>dilapidations surveys, studies and strategy</li> <li>estate surveys, studies and strategy</li> <li>valuation</li> <li>general administration</li> <li>rating appeals</li> </ul>
<b>Call-Off (Order) Ref</b>	1.11.4.4122. EMS-14490-2021
<b>Call-Off (Order) Date</b>	20 December 2021
<b>Call-Off Charges</b>	Various charges using rates as stated on Carter Jonas rate card provided to CCS
<b>Call-Off Start Date</b>	21 December 2021
<b>Call-Off Expiry Date</b>	The day falling 36 months after the Call-Off Start Date.
<b>Extension Period</b>	12 Months
<b>Maximum Liability</b>	<p>The limitation of liability for this Call-Off Contract is stated in Clause 11.2 of the Core Terms.</p> <p>The Estimated Year 1 Charges used to calculate liability in the first Contract Year is £17,000</p>
<b>Progress Report Frequency</b>	To Be Determined
<b>Progress Meeting Frequency</b>	To Be Determined

## CALL-OFF INCORPORATED TERMS

The documents listed in Part 2 of the Order Form under the heading "Call-Off Incorporated Terms" are incorporated into this Call-Off Contract and the order of precedence listed. Where numbers are missing those schedules are not incorporated into the Call-Off Contract.

No other Supplier terms are part of the Call-Off Contract. This includes any terms that have either been written on the back of, or added to, this Order Form, or presented to the Buyer at the time of Delivery.

## DELIVERABLES

The requirement
<p data-bbox="202 1084 1449 1117"><b>Supply a full range of Estate Management Services as required on a call off basis</b></p>

## PERFORMANCE OF THE DELIVERABLES

<b>Key Staff</b>
<b>NOT APPLICABLE</b>
<b>Key Subcontractors</b>
<b>NOT APPLICABLE</b>

For and on behalf of the Supplier:		For and on behalf of the Buyer:	
Signature:		Signature:	
Name:		Name:	
Role:	Equity Partner	Role:	Procurement Manager
Date:	18 January 2022	Date:	19 <sup>th</sup> January 2022

## Part 2 – Other Applicable Terms

### 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. This Order Form including the Call-Off Special Terms.
2. Joint Schedule 1 (Definitions and Interpretation) **RM6168**
3. Framework Special Terms
4. The following Schedules in equal order of precedence:

#### Joint Schedules for **RM6168**

- Joint Schedules for **RM6168**
- Joint Schedule 2 (Variation Form)
- Joint Schedule 3 (Insurance Requirements)
- Joint Schedule 4 (Commercially Sensitive Information)
- Joint Schedule 9 (Minimum Standards of Reliability)
- Joint Schedule 10 (Rectification Plan)
- Joint Schedule 11 (Processing Data)
- Joint Schedule 12 (Supply Chain Visibility)

#### Call-Off Schedules for **RM6168**

- Call-Off Schedule 1 (Transparency Reports)
- Call-Off Schedule 3 (Continuous Improvement)
- Call-Off Schedule 4 (Call Off tender (V3.1))
- Call-Off Schedule 5 (Pricing Details)
- Call-Off Schedule 8 (Business Continuity and Disaster Recovery)]
- Call-Off Schedule 9 (Security)
- Call-Off Schedule 10 (Exit Management)
- Call-Off Schedule 14 (Service Levels)
- Call-Off Schedule 15 (Call-Off Contract Management)
- Call-Off Schedule 16 (Benchmarking)
- Call-Off Schedule 18 (Background Checks)
- Call-Off Schedule 20 (Call-Off Specification)

5. CCS Core Terms (version 3.0.10)
6. Joint Schedule 5 (Corporate Social Responsibility) **RM6168**

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.

Framework Ref: RM6168 Estate Management Services

**Estate Management Services Template (Short Form)**

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**REIMBURSABLE EXPENSES**

None

**SERVICE CREDITS**

Not applicable

**ADDITIONAL INSURANCES**

Not applicable

**SOCIAL VALUE COMMITMENT**

Not applicable if not needed

**Note:** The Buyer will update this Order Form to reflect whether or not a guarantee is required once the identity of the Supplier is known. That will depend on whether the availability of guarantees for Call-Off Contracts is a condition of the Supplier being awarded a Framework Contract.