**Request for Quotation Ref: JPB002**

**Support for Environment Agency's Flood and Coastal Risk Management (FCRM) Improvements Portfolio - Benefits Mapping**

**Section 1**

**What is the Environment Agency?**

We are an Executive Non-departmental Public Body responsible to the Secretary of State for Environment, Food and Rural Affairs. Our principal aims are to protect and improve the environment, and to promote sustainable development.

Further information on our responsibilities, Corporate Plan and how we are structured can be found on our Website.

<https://www.gov.uk/government/organisations/environment-agency/about>

**What do we spend our money on?**

We are a major procurer of goods and services within the UK, spending circa £600M per annum, our major spend areas are:

* Flood and Coastal Risk Management (design, construction and maintenance)
* ICT and Telecommunications
* Vehicles and Plant
* Environmental Consultancy and Monitoring
* Temporary Staff and Contractors
* Facilities Management, Energy and Utilities
* Flood Management and Water Related Services

**What do we need from our suppliers?**

Suppliers are vital in supporting the delivery of our corporate plan. We aim to support the economy and society whilst delivering more environmental outcomes for every pound we spend. In many areas we are leading the way on environmental and technical developments. It is our role to ensure that suppliers clearly understand our corporate aims and objectives and know that we are committed to delivering the best value most sustainable solutions, taking into account the whole life cost of our procurement decisions. We promote diversity and equality and treat all of our suppliers fairly.

Our procurement strategy may be of interest to you as a potential supplier. It sets out our priorities and key commitments in a range of areas such as delivering our corporate plan, Government policy, supplier management and sustainable procurement:

<https://www.gov.uk/government/organisations/environment-agency/about/procurement#procurement-strategy>

**Government changes and collaboration**

Since 1 April 2013, the Environment Agency is no longer responsible for delivering the environmental priorities of Wales. This is now the remit of Natural Resources Wales (NRW).Further information can be found here:

<http://naturalresources.wales/splash?orig=/>

By bidding for this requirement, you may also be approached by other members of the Defra network, NRW or other government departments that are specifically named in the tender document.

**Further information**

For further information and to see our commitments to Diversity and Equality, please visit our website.

<https://www.gov.uk/government/organisations/environment-agency/about/procurement>

<https://www.gov.uk/government/organisations/environment-agency/about/equality-and-diversity>

Also, are you up to date on environmental legislation? See links below for further information.

Waste and Environmental Impact - <https://www.gov.uk/browse/business/waste-environment>

Environmental Regulations - <https://www.gov.uk/browse/business/waste-environment/environmental-regulations>’

**Section 2**

**The Customer**

**Summary**

The FCRM Improvements Portfolio is the key delivery mechanism for business improvement projectsfor the Flood and Coastal Risk Management (FCRM) business and for Incident Management.

Our Benefits Manager, Jeff Baldwin, is responsible for developing benefits management capability in the FCRM Improvements Portfolio, and for supporting Agency-wide initiatives on benefits and efficiency reporting.

## Contract Length

It is anticipated that this contract will be awarded to one supplier for a period of 4 months. Prices will remain fixed for the duration of the contract award period. We may at our sole discretion extend this contract to include related or further work. Any extension shall be agreed in advance of any work commencing and may be subject to further competition. Any amendment to contract prices for the extensions are to be by negotiation.

The Environment Agency Conditions of Contract for Services (Appendix C) shall apply to this contract.

This contract shall be managed on behalf of the Agency by:

**Jeff Baldwin** (Benefits Manager)

phone: 07990 793946 email: jeff.baldwin@environment-agency.gov.uk

## Contact Details and Timeline

**Jeff Baldwin** will be your contact for any questions linked to the content of the quote pack or the process. Please submit any questions by email and note that both the question and the response will be circulated to all known tenderers.

Key elements of the process have been reviewed. Anticipated dates for planned activities are below:

|  |  |
| --- | --- |
| **Activity** | **Due Date** |
| Publish RFQ on Contracts Finder | 5 September 2022 |
| Supplier responses to Request for Quote | 16 September 2022 23:59  |
| Evaluation of Request for Quote submissions | 23 September 2022  |
| Award of contract | 30 September 2022  |
| Project/Contract end date | 31 January 2023 |

Note that that these timescales and activities may be subject to change.

**Section 3**

## Evaluation Criteria

We will award this contract in line with the most economically advantageous tender set out in the following **award criteria**:

* Price – 60%
* Quality – 40%

The **Quality** criteria will be applied as follows.

|  |  |  |
| --- | --- | --- |
| **Quality criteria** | **Weight**  | **Notes** |
| Organisation’s capability in benefits management, and experience of personnel proposed for this work  | 20% | Provide a summary of your organisation’s capability in benefits management and experience of key personnel proposed for this work. See also Section 4  |
| Proposed approach, including approach to sustainable delivery  | 20% | Explain how you will plan and execute the work. See also Section 4Explain how you will approach the work sustainably. See also Section 7. For this contract reducing travel (for EA staff and supplier’s staff) and avoiding physical document handling and delivery is relevant.  |

Ability to complete the work in the required timescale is essential. Please confirm that you will have staff and other resources to commit to this work in the stated timescale.

The criteria listed above will be assessed on a 0 to 10 basis and will reflect the following judgements:

|  |  |
| --- | --- |
| **Rating of Response****The tenderer provides a response which in the opinion of the evaluators is:**  | **Score** |
| **Excellent:** Addresses all of the requirements and provides a response with relevant supporting information which does not contain any weaknesses, giving the Agency complete confidence that the requirements will be met. | 10 |
| **Very Good:** Addresses all of the requirements and provides a response with relevant supporting information, which contains very minor weaknesses, giving the Agency high confidence that the requirements will be met. | 8 |
| **Good:** Addresses all of the requirements and provides a response with relevant supporting information, which contains minor weaknesses, giving the Agency reasonable confidence that the requirements will be met.  | 6 |
| **Satisfactory:** Substantially addresses the requirements and provides a response with relevant supporting information which may contain moderate weaknesses, but gives the Agency some confidence that the requirements will be met.  | 4 |
| **Weak:** Partially addresses the requirements, or provides supporting information that is of limited relevance or contains significant weaknesses, and therefore gives the Agency low confidence that the requirements will be met. | 2 |
| **Nil:** No response or provides a response that gives the Agency no confidence that the requirements will be met.   | 0 |

**Section 4**

**Information to be returned**

**Please note, the following information requested must be provided. Incomplete tender submissions may be discounted.**

Please complete and return the following information:

* completed Pricing Schedule (Appendix A);
* completed Prior Rights Schedule (Appendix B);
* confirmation that terms and conditions are accepted (Appendix C. Please note that the terms cannot be amended later).
* details of the personnel you are proposing to carry out the service, including CVs of your key personnel;
* statement of how you propose to maintain continuity of personnel;
* details of proposed methodology
* detail your recent experience of carrying out similar contracts

**Section 5**

**Specification**

# Background to the Requirement

We require support to produce programme-level benefits maps for 4 programmes.

We need a supplier with:

* expertise in producing benefits maps
* ability to plan manage and facilitate benefits workshops
* availability to provide support between September 2022 and January 2023.

The portfolio manages a budget of around £200M over 5 years to 2027. There are 4 programmes and more than 100 projects live at any time. The 4 programmes are:

* Mapping Modelling and Data (MMD)
* Asset Management (AM)
* Strategy and Natural Adaptation (SNA)
* Incident Management (IM)

Stakeholders involved include: programme managers; programme sponsors; project executives; user representatives, portfolio management office (PMO) representatives.

Target audience: as stakeholders, plus project managers, technical leads.

We produced programme benefits maps in 2018. These will be made available to the supplier for inspection. They are not suitable for updating now, and will be provided for information only. We require a new set of benefits maps for each programme.



Example benefits map - for information only

Maps must be produced to an agreed consistent format. Suppliers may wish to refer to published sources such as the following for guidance.

* Managing Successful Programmes (MSP®) 5th Edition
* [Guide for Effective Benefits Management in Major Projects](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/671452/Guide_for_Effective_Benefits_Management_in_Major_Projects.pdf)  (p47)

# Specific Objectives/Deliverables

**Main deliverables**

* Documented plan, including: workshop format; map format, schedule.
* 4 x benefits mapping workshops
* 4 x programme benefits maps

Due to the complexity of the programmes we anticipate needing a simple overview map for each programme, linked to more detailed subsidiary maps.

**Key Requirements**

Establish communications between client and supplier, to include a single point of contact.

**Management information**

Report each month: overview of progress; activities completed; activities in progress; delayed activities; products delivered; planned activities for the following month; products to be delivered in the following month; issues; early warnings.

**Outline of activities and output.**

1. Review supplier-provided documents showing examples of existing benefits maps
2. Review supplier-provided documents detailing strategies and objectives, existing programmes, and existing and planned projects.
3. After a contract start-up meeting, prepare and attend an initial on-line workshop with Benefits Manager, colleagues from Portfolio Management Office and programme management staff to agree scope, workshop types/locations, format of outputs etc,
4. Document output from initial on-line workshop, including review by client and produce final version.
5. Propose and document workshop format for client’s agreement.
6. Plan primary workshops – 1 per programme – to include setting up formats for gathering information and pre-populating maps as agreed.
7. Facilitate primary workshops – 1 per programme – and record information
8. Produce draft benefits maps – 1 set per programme
9. Obtain review of each set of maps from client’s staff by a mix of secondary workshops, on-line meetings with individuals and discussion with client’s representative.
10. Produce draft final maps for client’s final edits.

Size of meetings and workshops:

* Contract start-up meeting will be with the Benefits Manager plus around 2 colleagues.
* Initial on-line workshop will be with the Benefits Manager, plus around 6-8 colleagues.
* Each primary workshop will involve around 10-15 EA staff.

Workshops may be either all on line (using Microsoft Teams), or a mix of on-line and face to face workshops from locations across England.

Please outline your preferred approach and the benefits of face to face or on-line workshops if you propose them.

Face to face workshops (if held) are likely to be in central locations in Bristol, London, or Birmingham.

Documents and maps will be exchanged in digital format. No paper documents are envisaged.

Client will own all output.

Client will arrange contacts with EA staff for workshops and reviews.

### Timescales/Deadlines

Refer to the timings in section 2.

The supplier will produce a schedule of planned activities including agreed timescales following the initial setup activities.

### Skills of Personnel Required

Personnel should have the skills required to plan, manage and carry out the work.

The suppliers’ representative should have appropriate project management skills.

**Section 6**

**Contract Management**

This contract shall be managed on behalf of the Agency by

**Jeff Baldwin**

07990 793946

jeff.baldwin@environment-agency.gov.uk

The supplier will attend an initial on-line workshop with the Benefits Manager, EA colleagues from Portfolio Management Office and programme management staff to agree scope, workshop types/locations, format of outputs. This meeting will take place in the first week of the contract.

The supplier will provide a monthly report (detailed in Section 2). The supplier’s representative will join a weekly phone/video call with the EA contract manager.

We will raise purchase orders to cover the cost of the services and will issue to the awarded supplier following contract award.

**Invoice schedule**

|  |  |  |
| --- | --- | --- |
| **Invoice** | **Milestone** | **% of tender value** |
| Invoice 1 | documented completion of planning stage | 10% |
| Invoice 2  | acceptance of Programme 1 draft benefits map | 20% |
| Invoice 3  | acceptance of Programme 2, 3 and 4 draft benefits maps | 40% |
| Invoice 4  | contract completion (following acceptance of all products)  | 30% |

The order of Programme workshops will be decided during the planning stage.

The supplier’s representative should confirm completion/acceptance with the EA contract manager before submitting invoices.

Before the invoice is issued, a fee note must be emailed in advance to the contract manager for approval. All invoices must quote the purchase order number. A file copy invoice must be provided to the contract manager, on request. The timescale for payment of invoices will be up to 30 days after we have received a valid invoice.

**Section 7**

**Sustainability Considerations**

We are committed to continually improving our sustainability performance. The Environment Agency has set itself tough objectives as a clear commitment and contribution to sustainable development throughout England. The Agency recognises that this can only be achieved through commitment from all sectors of society and it is intent on raising awareness amongst industry and commerce.

Contractors must adopt a sound proactive environmental approach, designed to minimise harm to the environment.

Environmental criteria should be considered as part of your tender submission with credit given for innovation. Factors to be considered could include areas such as:

* + - Paper use: All documents and reports prepared by consultants and contractors are produced wherever possible on recycled paper containing at least 100% post consumer waste and printed double sided.
		- Travel: use of public transport, reduce face to face meetings by using email and videoconferencing. Meetings to be held in locations to minimise travel and close to public transport links.
		- Packaging: should be kept to a minimum. Re-use and disposal issues must be considered.
		- Efficient Energy and Water Use.
		- Disposal of Waste: Whilst on site the contractor is responsible for the disposal of their own waste and can only use client facilities with express permission from the on site facilities officer.
		- Whilst on site, contractors should comply with the local environmental policy statement which will be made available to you in advance or on arrival.

**Diversity and Equal Opportunities**

We are committed to promoting equality and diversity in all we do and valuing the diversity of our workforce, customers and communities.  As a public body, we publish regular information about what our equality objectives are and how we’re meeting them.

<https://www.gov.uk/government/organisations/environment-agency/about/equality-and-diversity>

**Health and Safety**

Contractors will be responsible for making sure all required health and safety aspects including risk assessments are undertaken and required management measures are in place to protect worker exposure. This includes management of all partners, consortium members and subcontractors.

**IEM2020:**

## Sustainability Objectives

As the Environment Agency, our overarching aim is to protect and improve the environment for people and wildlife. Over the last 10 years we have achieved significant reductions in our environmental impacts that occur through our everyday operations. This included a 40% reduction in our carbon emissions and a 37% reduction in the number of miles we travel. This year we have launched our new Internal Environmental Management strategy to take us through to 2020, building on these successes and widening our ambition.

**Supply chain**

Our supply chain accounts for over 70% of our total environmental impacts.

Working with our supply chain we want to be world class in the area of environmental management. The environmental impacts of our work and that delivered by and through our supply chain must be reduced; environmental risks must be effectively managed and opportunities for enhancements investigated.

As an organisation, our environmental management system (EMS) is accredited to ISO14001 and EMAS standards. Our procurement activities form part of this system; driving environmental performance improvements across the value chain.

## Section 8

### Additional Information

### Copyright and confidentiality

Unless otherwise indicated, the copyright in all of the documentation belongs to the Environment Agency, and the documentation is to be returned to us with your tender. The contents of the documentation must be held in confidence by you and not disclosed to any third party other than is strictly necessary for the purposes of submitting your quote. You must also ensure that a similar obligation of confidentiality is placed upon any third party to whom you may need to disclose any of the documentation for the purposes of the tender.

### Accuracy of documentation

You should check all documentation; should any part be found to be missing or unclear you should immediately contact us at the address given in the covering letter. No liability will be accepted by the Environment Agency for any omission or errors in the documentation which could have been identified by you.

### Amendments to documentation

Prior to the date for return of tenders, we may clarify, amend or add to the documentation. A copy of each instruction will be issued to every Tenderer and shall form part of the documentation. No amendment shall be made to the documentation unless it is the subject of an instruction. The Tenderer shall promptly acknowledge receipt of such instructions.

### Alternative Offers

Alternative offers may be considered if they constitute a fully priced alternative and are submitted in addition to a quotation complying with the requirements of the Invitation to Quote Documents. If, for any reason you wish to submit an alternative offer without a fully compliant tender please contact us in accordance with the details in the covering letter.

## Continuity of personnel

The Contractor shall employ sufficient staff to ensure that the Services are provided at all times and in all respects to the Project Standard. It shall be the duty of the Contractor to ensure that a sufficient reserve of staff is available to ensure project delivery in the event of staff holidays, sickness or voluntary absence

The Environment Agency will be notified immediately of any changes to personnel associated with the project. The Contractor will ensure that every effort is made to replace outgoing staff with personnel of equal calibre and expertise. All new members of staff undertaking work for the Project will need to be agreed by the Environment Agency prior to commencement.

At all times, the Contractor shall only employ in the execution and superintendence of the Contract persons who are suitable and appropriately skilled and experienced.

## Intellectual property rights

All results, including material and tools produced, developed or paid for under this contract shall be the property of the Environment Agency.

## References

The Environment Agency may request recent and relevant references prior to the award of the project.

**Contract award**

This Request for Quote is issued in good faith but we reserve the right not to award any or all of this work.

### DATA PROTECTION ACT ADDENDUM TO SPECIFICATION

## Protection of personal data

In order to comply with the Data Protection Act 1998 the Contractor must agree to the following:

* You must only process the personal data in strict accordance with instructions from the Environment Agency.
* You must ensure that all the personal data that we disclose to you or you collect on our behalf under this agreement are kept confidential.
* You must take reasonable steps to ensure the reliability of employees who have access to personal data.
* Only employees who may be required to assist in meeting the obligations under this agreement may have access to the personal data.
* Any disclosure of personal data must be made in confidence and extend only so far as that which is specifically necessary for the purposes of this agreement.
* You must ensure that there are appropriate security measures in place to safeguard against any unauthorised access or unlawful processing or accidental loss, destruction or damage or disclosure of the personal data.
* On termination of this agreement, for whatever reason, the personal data must be returned to us promptly and safely, together with all copies in your possession or control.

# APPENDIX A - PRICING SCHEDULE

ALL COSTS QUOTED MUST BE EXCLUSIVE OF VAT

All costs must be quoted on this schedule. Any costs not detailed will not be paid.

**Staff Costs**

Please detail the day rates of your proposed personnel in the table below.

(Please also advise how many hours you constitute a working day)

Please detail your staff costs.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TASK** | **STAFF NAME/ ROLE** | **HOURLY RATE £** | **No.** **HOURS** | **COST** **£** |
| Task 1 |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Subtotal Task 1** |  |  |  |  |
| Task 2 etc.  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **TOTAL TASKS** |  |  |  |  |

Please detail your expenses

|  |  |  |  |
| --- | --- | --- | --- |
| **EXPENSE TYPE** | **RATE £/UNIT** | **NO, UNITS** | **COST** **£** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **TOTAL EXPENSES** |  |  |  |

Please detail any discounts

|  |  |
| --- | --- |
| **DISCOUNTS APPLIED**  | **DISCOUNT****£** |
|  |  |
|  |  |
|  |  |
| **TOTAL DISCOUNT** | **£** |

**Other costs**

Please state any other costs that may need to be taken into consideration.

|  |  |
| --- | --- |
| **DESCRIPTION** | **COST £** |
| **1. Other costs (please detail)** |  |
| **2. Other costs (please detail)** |  |
| **3. Other costs (please detail)** |  |
| **TOTAL**  |  |

**Discounts, rebates and reductions**

Please detail below any discounts, rebates and other reductions you are prepared to offer and the basis of those incentives

|  |  |
| --- | --- |
| **DESCRIPTION** | **AMOUNT** **£** |
|  |  |
|  |  |
|  |  |
| **TOTAL**  |  |

**Total Overall Cost**

Please detail the total fixed cost for the project

|  |  |
| --- | --- |
| **ITEM** | **TOTAL COST****£** |
| **Staff Costs** |  |
| **Expenses** |  |
| **Other Costs** |  |
| **Discounts/reductions** |  |
| **TOTAL Overall Cost** |  |

The following limits will be applicable to all claims for travel and subsistence under this contract:

1. Travel by rail: standard class should be used at all times
2. Travel by car: 45 pence/mile

Hotel bookings should be made through the Environment Agency’s corporate travel contract. Details of this contract are available from the Corporate Contracting Team.

When making reservations you should state that you are a contractor working on Environment Agency business.

Hotel charges must not exceed a maximum limit per night bed and breakfast (VAT included) of: £140 in London; £100 in Bristol; £90 in Warrington; £85 in Reading; £75 in Aberdeen, Birmingham, Belfast, Cardiff, Coventry, Edinburgh, Glasgow, Harlow, Leeds, Manchester, Middlesbrough, Newcastle, Oxford, Portsmouth, Sheffield and York; and £70 in all other destinations. Please note that these hotel ceiling rates are subject to change throughout the life of the contract.

Expenditure on dinner during an overnight stay must not exceed a maximum limit of £25, including a drink.

Receipts for all rail travel, hotel and food expenses will be required as proof of expenditure and will be reimbursed at cost. No profit or additional cost shall be applied by the contractor to such personal expenses.

**APPENDIX B - PRIOR RIGHTS SCHEDULE**

Details of Prior Rights held by the Parties (To be updated as Rights are introduced during the period of the Contract)

Prior Rights owned or lawfully used by a Party, whether under licence or otherwise, which it introduces to the Project for the purposes of fulfilling its obligations under the Contract

Held by the Environment Agency

|  |  |  |
| --- | --- | --- |
| **Name and description of Prior Rights** | **Extent of proposed use in the Project**  | **Proprietary owner of the Prior Rights** |
| Client supplied data and information | Use for purposes of responding to this request for quotation, and fulfilling any subsequent contract.  | Environment Agency |
|  |  |  |
|  |  |  |

Held by the Contractor

|  |  |  |
| --- | --- | --- |
| **Name and description of Prior Rights** | **Extent of proposed use in the Project**  | **Proprietary owner of the Prior Rights** |
|  |  |  |
|  |  |  |
|  |  |  |

**Explanation of Contractor's Prior Rights**
All Intellectual Property Rights owned by or lawfully used by the Contractor, whether under licence or otherwise before the date of this Contract. It can also mean any invention and know how or other intellectual property (whether or not patentable) owned by one of the parties prior to the commencement of the Project, or devised or discovered by one of them only in the course of other projects during the Project period and not arising directly from the Project.

**APPENDIX C – ACCEPTANCE OF TERMS AND CONDITIONS**

I/We accept in full the terms and conditions named in Section 2 and appended to this Request for Quote document.

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Link to conditions of contract:

<https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/727887/ODT-Environment-Agency-Conditions-of-Contract-Services-2018.odt>