

**Crown Commercial Service**

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

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**FRAMEWORK SCHEDULE 4**

**CALL OFF ORDER FORM**

## PART 1 – CALL OFF ORDER FORM

### SECTION A

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

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

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

Order Number	<b>TBC</b>
From	<b>Valuation Office Agency ("CUSTOMER")</b>
To	<b>Atkins Limited  ("SUPPLIER")</b>
Date	<b>31<sup>st</sup> October 2019 ("DATE")</b>

### SECTION B

#### 1. CALL OFF CONTRACT PERIOD

<b>1.1.</b>	<b>Commencement Date: 31<sup>st</sup> October 2019</b>
<b>1.2.</b>	<b>Expiry Date: 28<sup>th</sup> February 2020</b>  End date of Initial Period: <b>28<sup>th</sup> February 2020</b>  End date of Extension Period: <b>up to 4 weeks – subject to Customer's approval</b>  Minimum written notice to Supplier in respect of extension: <b>10 days</b>

#### 2. SERVICES

## 2.1 Services required:

In Call Off Schedule 2 (Services)

### **Quoted from Tender Specification:**

#### 1.1. Component 1: Top-level 'to be' Process Designs (Due 17/12/2019)

##### **Objective**

The objective of this product is to establish agreement on the future direction of travel of the VOA's business processes. This includes the following deliverables:

- Rapidly developing an understanding of the current business architecture and development of a new valuation-centric & process-agnostic view of the business;
- Challenging current thinking around the legal restrictions on our current processes as well as identifying where 'small' legal changes could yield substantial 'to-be' process benefits;
- Production of 'to-be' high-level process maps (derived from the valuation-centric view) that are as consistent as possible across all business areas and aligned with the VOA's strategic direction of travel of more frequent non-domestic rating revaluations and increased automation. These will need to ensure alignment with contemporary developments in data sharing and technology systems to support the processes;
- Cost modelling and simulation modelling of suggested 'to-be' processes, optimising the use of available data and opportunities to automate.

##### **Proposed Methodology**

- The analysis of the current business architecture should include a literature review of existing materials relating to the VOA legal context (products developed by the VOA Programme Team) held by the VOA, as well as facilitated workshop(s) and/or interviews with senior leaders and their representatives to understand the VOA's strategic and legal context;
- The new valuation-centric and process-agnostic view of the business should be derived through the application of best practice, whilst consulting and working collaboratively with the Programme Design Team appointed by the VOA Programme Team;

- The chosen partner will be required, alongside delivery of the component, to provide an options appraisal on the chosen approach, recommendations on how VOA would prioritise eventual delivery and a suggested delivery approach including success measures, and;
- Proposed 'to be' processes should be approved by the Programme Design Director and Senior Responsible Owner (SRO)

**1.2. Component 2: Conceptual data models & data flows (Due 24/01/2020)**

**Objective**

The objective of this product is to establish agreement on the future direction of travel of the VOA's data models and flows. This includes the following deliverables:

- Creating new conceptual data models and an accompanying high-level view on data flows that will support designed 'to be' processes. The proposed data model will need to take account of all functional and geographical entities as implied and mandated by current legislation. These have already been identified and are contained in existing documentation on the Agency's 'Business Landscape'

**Proposed Methodology**

- Undertaking workshops with the Programme Design Team and other relevant key stakeholders to understand the VOA's customer & business requirements for the new data structures and flows. This will include:
  - Working with the Programme Design Team to identify key business entities that are the subject of the "to-be" business processes.
  - Identifying what data is required by each process step to create the inward and outward data flows.
- The chosen partner will be required, alongside delivery of the component, to provide an options appraisal on the chosen approach, recommendations on how VOA would prioritise eventual delivery and a suggested delivery approach including success measures,
- Proposed data models and work flows should be approved by the Programme Design Director and SRO

**1.3. Component 3: End-to-end customer journeys (Due 28/02/2020)**

**Objective**

The objective of this product is to establish agreement on the direction of travel for operational staff and external customer experiences, upon implementation of proposed 'to be' processes and supporting data models and technologies. This includes the following deliverables:

- Production of a set of end-to-end customer journeys detailing how the VOA's operational staff will interact with and experience the designed processes.
- Production of a set of end-to-end customer journeys detailing how the VOA's external customers will interact with and experience the designed processes.

**Proposed Methodology**

- Review of existing materials and VOA structures to establish existing customer journeys;
- Development of new customer journeys based on outputs from Components 1 and 2
- Facilitated workshop(s) and/or structured interviews to establish and validate practicality and robustness of new customer journeys; and
- Proposed customer journeys should be approved by the Programme Design Director and SRO.

**1.4. Processes in scope**

Initial Delivery and overall design:

- Non-domestic Rates Revaluation;
- Non-domestic Rates Maintenance;
- Council Tax Maintenance;
- Check, Challenge and Appeal;

	<p>Overall design (non-exhaustive):</p> <ul style="list-style-type: none"> <li>• Consumer Price Index Housing/Retail Price Index data provision;</li> <li>• Fair Rents, Housing Benefit &amp; Collecting Lettings information;</li> <li>• Council Tax Proposals, Appeals and Informal Challenges;</li> <li>• District Valuer Services</li> </ul> <div style="text-align: center;">  <p>BST specification VOA_Final.pdf</p> </div> <p><b><u>Supplier's Tender Response (Outlining the Services within the scope of this Call-Off Contract and how they will be delivered):</u></b></p> <p>REDACTED</p>
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### 3. PROJECT PLAN

<b>3.1.</b>	<p><b>Project Plan:</b> In Call Off Schedule 4 (Project Plan)</p> <p>REDACTED</p>
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### 4. CONTRACT PERFORMANCE

<b>4.1.</b>	<p><b>Standards:</b></p> <p>Aligned with Managing Successful Programmes (MSP®) methodology</p>
<b>4.2</b>	<p><b>Service Levels/Service Credits:</b></p> <p>Not applied</p>
<b>4.3</b>	<p><b>Critical Service Level Failure:</b></p> <p>Not applied</p>
<b>4.4</b>	<p><b>Performance Monitoring:</b></p> <p>As a minimum we would expect to be provided with a weekly highlight report summarising % complete versus % forecast progress against agreed product milestones, any risks to successful delivery and proposed mitigations, and a financial summary of costs incurred and projected out-turn.</p>

	<p>The chosen partner will be required to work closely and alongside a designated group of VOA Subject Matter Experts resource (the Programme Design team).</p> <p>It is expected that this relationship will be collaborative in nature, and acceptance of produced products will be contingent on agreement in accordance with the Acceptance Process outlined in 3.1 Project Plan by the Programme Design Director.</p> <p>Proposed customer journeys will be subject to approval in accordance with the Acceptance Process outlined in the Project Plan.</p> <p>The chosen partner is required to report regularly (weekly via a “show and tell” at our Canary Wharf office) to the Programme Design Director, Programme Manager and other key stakeholders.</p>
<b>4.5</b>	<p><b>Period for providing Rectification Plan:</b></p> <p>In Clause 39.2.1(a) of the Call Off Terms</p>

## 5. PERSONNEL

<b>5.1</b>	<p><b>Key Personnel:</b></p> <p><b>REDACTED – Managing Consultant</b></p> <p><b>REDACTED – Principal Consultant</b></p> <p><b>REDACTED – Client Technology Director (SME Panel)</b></p> <p><b>REDACTED – Regional Director (SME Panel)</b></p>
<b>5.2</b>	<p><b>Relevant Convictions</b> (Clause 28.2 of the Call Off Terms):</p> <p>Supplier’s Key Personnel have SC clearance</p>

## 6. PAYMENT

**6.1 Call Off Contract Charges** (including any applicable discount(s), but excluding VAT):  
 In Annex 1 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)  
**As per Supplier's Tender Price Submission:**

	Milestone Date	Milestone Payment
Component 1	REDACTED	REDACTED
Component 2	REDACTED	REDACTED
Component 3	REDACTED	REDACTED

	Job Role	Daily Rate	Number of Days	Total Cost
Component 1	Engagement Lead	REDACTED	REDACTED	REDACTED
	Business Analyst	REDACTED	REDACTED	REDACTED
	SME Panel	REDACTED	REDACTED	REDACTED
	Discount	REDACTED	REDACTED	REDACTED
Component Total				REDACTED
Component 2	Engagement Lead	REDACTED	REDACTED	REDACTED
	Business Analyst	REDACTED	REDACTED	REDACTED
	SME Panel	REDACTED	REDACTED	REDACTED
	Discount	REDACTED	REDACTED	REDACTED
Component Total				REDACTED
Component 3	Engagement Lead	REDACTED	REDACTED	REDACTED
	Business Analyst	REDACTED	REDACTED	REDACTED
	SME Panel	REDACTED	REDACTED	REDACTED
	Discount	REDACTED	REDACTED	REDACTED
Component Total				REDACTED
<b>Total Cost</b>				<b>£80 000</b>

**6.2 Payment terms/profile** (including method of payment e.g. Government Procurement Card (GPC) or BACS):  
 In Annex 2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)  
 The current system will soon be replaced by a SAP Ariba P2P (Procure to Pay) platform.  
 Successful Tenderers will initially be required to provide information so that they may be

	adopted onto the current system and, when the SAP Ariba P2P system is deployed, will then need to register on the Ariba Network in order to transfer over to the VOA SAP Ariba system and ensure that they will continue to be able to receive purchases orders and issue invoices.
<b>6.3</b>	<p><b>Reimbursable Expenses:</b></p> <p>Permitted – subject to the Programme Design Director’s approval.</p> <p>Any Travel and Subsistence expenses should comply with VOA Policy.</p> <p> VOA T&amp;S Policy.docx</p>
<b>6.4</b>	<p><b>Customer billing address</b> (paragraph 7.6 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>Invoices should be provided within one month of acceptance of deliverables in accordance with the Acceptance Criteria. Payments will be made via an electronic payments system, ERP and sent to voainvoices.ap@hmrc.gov.uk (including the purchase order provided). Payments will be made into the bank account provided by the supplier.</p>
<b>6.5</b>	<p><b>Call Off Contract Charges fixed for</b> (paragraph 8.2 of Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>Duration of the Call Off contract.</p>
<b>6.6</b>	<p><b>Supplier periodic assessment of Call Off Contract Charges</b> (paragraph 9.2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)) will be carried out on:</p> <p>Not Applicable due to fixed price agreement.</p>
<b>6.7</b>	<p><b>Supplier request for increase in the Call Off Contract Charges</b> (paragraph 10 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>Not Permitted</p>

## 7. LIABILITY AND INSURANCE

<b>7.1</b>	<p><b>Estimated Year 1 Call Off Contract Charges:</b></p> <p>The sum of £80, 000.</p>
<b>7.2</b>	<p><b>Supplier’s limitation of Liability</b> (Clause 37.2.1 of the Call Off Terms);</p> <p>The aggregate liability of the Supplier in respect of all other Losses howsoever caused, whether arising from breach of this Call Off, the supply or failure to supply of the Services, misrepresentation (whether tortious or statutory), tort (including negligence), breach of statutory duty or otherwise shall in no event exceed a sum equal to the greater of 125% of the Charges paid or payable to the Supplier.</p>
<b>7.3</b>	<p><b>Insurance</b> (Clause 38.3 of the Call Off Terms):</p>

	The Supplier shall make best efforts to maintain insurance coverage against legal liabilities arising out of or in connection with the performance, or otherwise, of its obligations under this Call Off Contract, subject always to the availability of such insurance on commercially reasonable terms.
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## 8. TERMINATION AND EXIT

<b>8.1</b>	<b>Termination on material Default</b> (Clause 42.2 of the Call Off Terms): In Clause 42.2.1(c) of the Call Off Terms
<b>8.2</b>	<b>Termination without cause notice period</b> (Clause 42.7 of the Call Off Terms): The period of thirty (30) Working Days in Clause 42.7 shall be amended to 10 (ten) Working Days.
<b>8.3</b>	<b>Undisputed Sums Limit:</b> In Clause 43.1.1 of the Call Off Terms
<b>8.4</b>	<b>Exit Management:</b> In Call Off Schedule 9 (Exit Management)

## 9. SUPPLIER INFORMATION

<b>9.1</b>	<b>Supplier's inspection of Sites, Customer Property and Customer Assets:</b> Not applicable
<b>9.2</b>	<b>Commercially Sensitive Information:</b> All pricing information including daily rates, basis of estimate, costing templates, discounts and Price in the delivery of this Call-Off Contract.

## 10. OTHER CALL OFF REQUIREMENTS

<b>10.1</b>	<b>Recitals</b> (in preamble to the Call Off Terms): Recitals B to E
<b>10.2</b>	<b>Call Off Guarantee (Clause 4 of the Call Off Terms):</b> Not required
<b>10.3</b>	<b>Security:</b> Select short form security requirements The proposed staff in paragraph 1.5 hold SC level clearance.

<b>10.4</b>	<b>ICT Policy:</b> VOA ICT Policy as provided to the Supplier prior to the commencement of the Services or subsequently as specifically relevant to delivery and agreed with the Supplier.
<b>10.6</b>	<b>Business Continuity &amp; Disaster Recovery:</b> In Call Off Schedule 8 (Business Continuity and Disaster Recovery)
<b>10.7</b>	<b>NOT USED</b>
<b>10.8</b>	<b>Protection of Customer Data</b> (Clause 35.2.3 of the Call Off Terms): Compliance with ISO/IEC 27001 and/or ISO/IEC27002
<b>10.9</b>	<b>Notices</b> (Clause 56.6 of the Call Off Terms): Customer's postal address and email address: 10 South Colonnade, London, E14 4PU Email: information.disclosure@voa.gsi.gov.uk <b>Supplier's postal address and email address:</b> <b>Customer's postal address and email address: Nova North, 11 Bressenden Place, London, SW1E 5BY</b> <b>Email: REDACTED</b>
<b>10.10</b>	<b>Transparency Reports</b> In Call Off Schedule 13 (Transparency Reports)
<b>10.11</b>	<b>Alternative and/or Additional Clauses from Call Off Schedule 14 and if required, any Customer alternative pricing mechanism:</b> Not used
<b>10.12</b>	<b>Call Off Tender:</b> In Schedule 16 (Call Off Tender) – Atkins Final Tender Response <b>REDACTED</b>
<b>10.13</b>	<b>Publicity and Branding (Clause 36.3.2 of the Call Off Terms)</b> Not used
<b>10.14</b>	<b>Staff Transfer</b> Annex to Schedule 10, List of Notified Sub-Contractors (Call Off Tender). Not applicable
<b>10.15</b>	<b>Processing Data</b> Call Off Schedule 17
<b>10.16</b>	<b>MOD DEFCONs and DEFFORM</b> Call Off Schedule 15  Not Applicable

## Schedule 4 - Project Plan

REDACTED

## 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	04/11/19

### For and on behalf of the Customer:

Name and Title	REDACTED
Signature	REDACTED
Date	04/11/19