

# Framework Schedule 1 (Specification)

## 1. Introduction

- 1.1. This Schedule sets out what we and our Buyers want.
- 1.2. The supplier must only provide the Deliverables for the Lot that they have been appointed to.
- 1.3. For all Lots and/or Deliverables, the Supplier must help Buyers comply with any specific applicable Standards of the Buyer.
- 1.4. The Deliverables and any Standards set out in Paragraph 1 below may be refined (to the extent permitted and set out in the Order Form) by a Buyer during a Further Competition Procedure to reflect its Deliverables Requirements for entering a particular Call-Off Contract.

## 2. Our social value priorities

These are our priorities in this procurement:

- 2.1. Helping local communities recover from the impact of COVID-19 such as:
  - Supporting people and communities to manage and recover from the impacts of COVID-19, including those worst affected or who are shielding.
  - Supporting organisations and businesses to manage and recover from the impacts of COVID-19, including where new ways of working are needed to deliver services.
  - Supporting the physical and mental health of people affected by COVID-19, including reducing the demand on health and care services.
  - Improving workplace conditions that support the COVID-19 recovery effort including effective social distancing, remote working, and sustainable travel solution.
- 2.2. Tackling economic inequality such as:
  - Creating opportunities for entrepreneurship and helping new, small organisations to grow, supporting economic growth and business creation.
  - Creating employment opportunities particularly for those who face barriers to employment and/or who are located in deprived areas.
  - Creating employment and training opportunities, particularly for people in industries with known skills shortages or in high growth sectors.
  - Support educational attainment relevant to the contract, including training schemes that address skills gaps and result in recognised qualifications.
  - Influence staff, suppliers, customers and communities through the delivery of the contract to support employment and skills opportunities in high growth sectors.
- 2.3. Increase supply chain resilience and capacity by:
  - Creating a diverse supply chain to deliver the contract including new businesses and SMEs.
  - Supporting innovation and disruptive technologies throughout the supply chain to deliver lower cost and/or higher quality goods and services.
  - Supporting the development of scalable and future-proofed new methods to modernise delivery and increase productivity
  - Demonstrating collaboration throughout the supply chain, and a fair and responsible approach to working with supply chain partners in delivery of the contract.
  - Demonstrating action to identify and manage cyber security risks in the delivery of the contract including in the supply chain.

- Influencing staff, suppliers, customers and communities through the delivery of the contract to support resilience and capacity in the supply chain

2.4. Fighting Climate change such as

- Delivering additional environmental benefits including working towards net zero greenhouse gas emissions.
- Influencing staff, suppliers, customers and communities through the delivery of the contract to support environmental protection and improvement.

2.5. Equal opportunities such as:

- Demonstrating action to increase the representation of disabled people in the contract workforce.
- Supporting disabled people in developing new skills relevant to the contract, including through training schemes that result in recognised qualifications.
- Influencing staff, suppliers, customers and communities through the delivery of the contract to support disabled people.
- Demonstrating action to identify and tackle inequality in employment, skills and pay in the workforce.
- Supporting in-work progression to help people, including those from disadvantaged or minority groups, to move into higher paid work by developing new skills relevant to the contract.
- Demonstrating action to identify and manage the risks of modern slavery in the delivery of the contract, including in the supply chain.

2.6. Promoting Wellbeing such as:

- Demonstrating action to support the health and wellbeing, including physical and mental health, in the workforce.
- Influencing staff, suppliers, customers and communities through the delivery of the contract to support health and wellbeing, including physical and mental health.
- Demonstrating collaboration with users and communities in the co-design and delivery of the contract to support strong integrated communities.

2.7. The Buyer can identify specific social value priorities during the Call-Off procedure.

### 3. Mandatory Social Value

3.1. This framework contract requires the Supplier to embed social value into all call-off contracts, in line with the Social Value Act 2012 or subsequent government initiatives to enable the effective implementation of the Act.

3.2. As a condition of participating on this framework contract, CCS requires suppliers on this framework contract to demonstrate they are committed to report on the impact of social value throughout the lifetime of the framework contract to CCS, every 12 months from the framework start date

3.3. Suppliers must provide evidence of their commitment to social value and demonstrate an ability and willingness to work with Buyers to identify and help further their social value requirements in all call-off contracts. To satisfy this requirement, Suppliers must agree to provide or deliver reasonable and proportionate social value benefits within all call-off contracts. Suppliers should consider the following policy themes, as a minimum:

- COVID-19 recovery
- Tackling economic inequality;
- Fighting climate change;
- Equal opportunity; and

- Wellbeing
- 3.4. Suppliers are expected to act with these priorities in mind, and CCS may discuss these priorities as part of framework management meetings.
  - 3.5. The Buyer's requirements will be set out in the call-off Procedure. The Supplier shall comply with and/or identify proposed social value initiatives, proportionate and relevant to each call-off contract.
  - 3.6. The Supplier shall deliver measurable benefits and impacts in respect of the social value priorities, when identified in the call-off contract.
  - 3.7. The Supplier shall record and report performance against the social value requirements, when detailed in the call-off contract.

#### **4. The Lots**

- 4.1. The Services are divided into seven Lots:
  1. Total Estate Management
  2. Estate (Property) Management
  3. Agency and Lease Management
  4. Surveying and Strategic Advice
  5. Valuation and Compulsory Purchase Orders
  6. Business Rating Services
  7. Integrated Workplace Management
- 4.2. The Services within each Lot are contained below, this Specification is not an exhaustive list. Buyers may require other similar Services, which will be detailed in the Call-Off Procedure. The scope of the Services for each Lot shall remain as described in this Specification and the contract notice placed in the Official Journal of the European Union.
- 4.3. Any Service standards and Key Performance Indicators (KPIs) that apply to the Services for each Lot are not set out in this Specification as it is the Buyer's responsibility to set these as appropriate in the Call-Off Procedure.

#### **5. Mandatory Service Requirements: All Lots**

- 5.1. The Supplier shall comply with all schedules linked to RM6168 Estate Management Services Framework
- 5.2. The Supplier shall meet the following requirements in their entirety in order to provide the Services under each Lot as defined as "Mandatory Requirement" in Table 1 (below), during the Framework Contract Period and until any Call-Off Contracts established under this Framework Contract expire. Where the Buyer is referenced this shall also be interpreted to include the Buyer's client.
- 5.3. The Supplier shall provide advice to the Buyer in relation to best practice, and the most efficient and cost effective methods of conducting the disclosure exercise as a whole.
- 5.4. The Supplier shall consider the quality, cost-effectiveness and efficiency of any proposed solution, and shall work to review and improve its systems with regard to these elements on an ongoing basis throughout the duration of the Framework.

- 5.5. The Supplier shall provide professional management, advice, guidance, negotiation and assistance on land, property and estates issues, including but not limited to those Services set out in Table 1
- 5.6. The Supplier shall work to meet deadlines agreed with the Buyer at Call-Off and is expected to manage its staff and internal processes to achieve this.
- 5.7. The Buyer will confirm their required Services during the Call-Off procedure.

## **6. General Service Requirements**

- 6.1. Suppliers shall deliver all elements of the services relevant to their given Lot as part of this Framework
- 6.2. Prior to or upon receipt of an order to undertake Estates Management Services, the Supplier shall provide an initial report that sets out their understanding of the brief, proposed approach to the task and fee proposal. An agreement must be made on the level of expertise and experience of the personnel to be involved with the Buyer. Whilst wishing to retain continuity within instructions, it is recognised that there may be occasions where a change in personnel is required, or even desirable. The Supplier shall ensure that any replacements are agreed with the Buyer and that suitable arrangements are made to enable a smooth handover transition thus minimising any detrimental effect and avoiding any additional costs to the Buyer.
- 6.3. For recommendations or advice given on financial settlements or valuations, the assessments shall be supported with relevant data. This will include comparable information of market transactions and costed breakdowns of other factors that have an effect on the value.
- 6.4. When terms are recommended for settlement, the Supplier shall provide the Buyer with a clear and unambiguous written statement before the terms are accepted. The terms shall be the best terms available and represent open market value. Any departure from these terms shall be set out in a written statement and issued to the Buyer before they are accepted.
- 6.5. Where Estates Services require a conclusion to be legally formalised the Supplier shall work with the Buyer's appointed legal advisor, providing all necessary information and guidance to ensure a timely and satisfactory conclusion to the transaction.
- 6.6. If agreement cannot be reached on a dispute, then mediation will be through RICS (Royal Institution of Chartered Surveyors).
- 6.7. Where the Services result in any changes to the Buyer's Estate, the Supplier shall provide all necessary assistance and information to update the Buyer's property records.
- 6.8. In all leasehold transactions, reporting must take full account of the effect of the transaction on both the landlord's and tenant's interests, the scope for creating marriage value and the extent to which this has been obtained for the Buyer.
- 6.9. A formal order has to be issued by the Buyer to the Supplier before any chargeable Services are to be undertaken. The Supplier cannot accept such an order without a framework access agreement number being present.
- 6.10. The Supplier shall provide a senior representative to the Authority, departmental property or sector forums, including general property

- 6.11. The Supplier shall develop and deliver training courses, knowledge transfer, and industry best practice to the Authority and the Buyer to develop and improve Intelligent client functionality.
- 6.12. The Supplier shall provide regulation focussed awareness sessions for the Authority and Buyer on new and emerging strategies and regulations.

## Specification

### 7. Lot 1 - Total Estate Management

- 7.1. Operation and management to support the occupation of the central government and wider public sector estate, providing technical due diligence where required, providing an end to end service provision for the lifecycle of a property.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:	Mandatory
<b>1.1.0</b>	<b>Estate (Property) Management</b>		
<b>1.1.01</b>	<b>Estate, asset &amp; property management</b>	Asset management of the commercial, retail, industrial, residential, institutional, land, agricultural or other estate, integrating and liaising with current estate suppliers as necessary (including maximising revenue, managing maintenance and repair, interaction with occupiers and key service providers, budget management and forecasting).	Yes
<b>1.1.02</b>		Landlord management (including Landlord consents).	Yes
<b>1.1.03</b>		Tenant management.	Yes
<b>1.1.04</b>		Service charge management.	Yes
<b>1.1.05</b>		Energy management (bureau services).	No
<b>1.1.06</b>		Managing and delivering Buyer strategic asset management plans (SAMP), including sustainability performance of property assets (workplace technology systems may be used to monitor, report and display capacity, availability, usage and occupational trends through Ai and IoT solutions).	Yes
<b>1.1.07</b>		Managing statutory compliance and reporting of property assets (risk, fire safety and health and safety compliance).	Yes
<b>1.1.08</b>		Workplace planning and space optimisation including, but not limited to, demand assessment, capacity testing and performance of assets (including workplace technology systems to monitor, report and display capacity, availability, usage and occupational trends through Ai and IoT solutions).	Yes

<b>1.1.09</b>		Monitoring, improving, reporting and making recommendations on Buyer satisfaction of assets and occupier wellbeing, including post- implementation reviews of change programs, refurbishments, capital programs, works and day-to-day occupation.	Yes
<b>1.1.10</b>		Development, ownership and responsibility for managing the Buyer estate information within their own property database or suppliers, ensuring that its management and maintenance is real time, and that it shall interface and be compatible with the supplier's database for the estate.	Yes
<b>1.1.11</b>		Third party supplier management relating solely to Buyer occupations (development of contract registers and contract management on behalf of the Buyer, who retains contract ownership).	No
<b>1.1.12</b>	<b>Treasury services</b>	Financial management, including checking, paying and reporting on Buyer service charges, insurance and rent, including general administration, as specified by the Buyer.	Yes
<b>1.1.13</b>	<b>Vacant property management</b>	Vacant property management, including regular visits and the provision of appropriate security measures.	Yes
<b>1.1.14</b>		Property guardianship - may include a property guardian who is a working professional, who protects a vacant property by occupying a shared living space under a non-exclusive licence agreement.	No
<b>1.1.15</b>	<b>Moveable equipment asset management</b>	Moveable equipment asset management - management, control and tracking of moveable assets.	No
<b>1.1.16</b>	<b>Estate management support services</b>	Onboarding and co-location services to support the sharing of estate between government departments.	Yes
<b>1.1.17</b>		Interdepartmental occupational management (e.g. MOTO) - acting on behalf of the Buyer in the	Yes

		development and management of cross-departmental agreements for sharing space.	
<b>1.1.18</b>		Commercialisation services and strategies - identifying additional sources of income from assets.	No
<b>1.1.19</b>		Provision of workplace support services - H&S, risk management, display screen equipment assessments, incident management, first aiders.	No
<b>1.1.20</b>		Daylighting, sun lighting, overshadowing and rights of light - initial report, to be agreed with the Buyer, covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes. Undertake and manage negotiations to a satisfactory outcome, to be agreed with the Buyer.	Yes
<b>1.1.21</b>		Party Walls - Acting on behalf of the Buyer as the building owner or adjoining owner within the Party Wall Act 1996.	Yes
<b>1.1.22</b>		Wayleaves & easements - Services (initial report covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes, as agreed with the Buyer - undertake and manage negotiations to a satisfactory outcome) acting on behalf of the Buyer in the grant of wayleaves (terminable) and easements (permanent) access agreements	<b>Yes</b>
<b>1.1.23</b>		Other neighbourly matters - initial report to be agreed with Buyer, covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes with respect to all boundary disputes or other neighbourly matters. Undertake and manage negotiations to a satisfactory outcome, to be agreed with the Buyer.	Yes
<b>1.2.0</b>	<b>Agency &amp; Lease Management</b>		



<b>1.2.01</b>	<b>Acquisition of Land, Freehold or Leasehold Property</b> (includes letting or other commercial arrangements)	The preparation of lists of potential properties or land (including availability review of the government estate via the Government Property Agency); Assistance in identifying appropriate terms; Identification of any surveys that may be required; Advice on the most appropriate solution; Undertaking negotiations; Agreeing appropriate terms and conditions; Acquiring the recommended asset; and Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
<b>1.2.02</b>	<b>Pre-acquisition survey</b> or more detailed technical due diligence inspection and report for freehold or leasehold property.	Detailed survey; Reviewing technical data available for the property; Planning restrictions; Operation and maintenance data; Organising environmental assessments; Considering implications for the building's potential use, including occupancy capacity testing; Taking into account the suitability for the intended use.	Yes
<b>1.2.03</b>	<b>Acquisition outline feasibility study</b>	Provide services related to RIBA Stage planning 0, 1, 6 & 7.	Yes
<b>1.2.04</b>	<b>Rent reviews</b>	Initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes; Manage negotiations through to a satisfactory conclusion; Comprehensive final report to support a recommendation on a figure for settlement; Liaising with the Buyer's solicitors and with other relevant professionals, providing all reasonably necessary input as required.	Yes
<b>1.2.05</b>	<b>Lease breaks &amp; lease expiries</b>	Initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes; Manage negotiations through to a satisfactory conclusion; Comprehensive final report to support a recommendation; Liaising with the Buyer's solicitors and with other relevant professionals, providing all reasonably necessary input as required.	Yes

<b>1.2.06</b>	<b>Lease renewals &amp; lease regear</b>	Initial report covering all significant facts, setting out actions, negotiating strategies and anticipated outcomes; Manage negotiations through to a satisfactory conclusion; Comprehensive final report to support a recommendation, including support preparing lease exemption request (LER) business cases, if required; Liaising with the Buyer's solicitors and with other relevant professionals, providing all reasonably necessary input as required.	Yes
<b>1.2.07</b>	<b>Disposal</b> 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)	Initial report with budget costs, valuations, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks; Marketing and disposal; Final recommendation report, including any need for claw back, with advice on amounts and mechanism; Liaising with the Buyer's solicitors and with other relevant professionals, providing all reasonably necessary input as required.	Yes
<b>1.2.08</b>	<b>Lease consents</b>	Initial report with budget costs, valuations, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks; Taking full account of the Buyer's best interest, the statutory position, the Buyer's estate strategy, business needs, condition of the building, dilapidation liabilities and the state of the market; Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
<b>1.2.09</b>	<b>Lease surrender &amp; regrant</b>	Initial report covering all significant facts setting out actions, negotiating strategies and anticipated outcomes; Manage negotiations through to a satisfactory conclusion; Comprehensive final report to support a recommendation, including support preparing lease exemption request (LER) business cases, if required; Liaising with the Buyer's solicitors and with other	Yes

		relevant professionals, providing all reasonably necessary input as required.	
<b>1.2.10</b>	<b>Dilapidations</b>	Preparation - obtain all relevant documentation; Inspection; Preparation of schedule of claim; Quantified demand; Response and negotiation; Recommendation and settlement (if applicable); Liaising with the Buyer's solicitors and with other relevant professionals, providing all reasonably necessary input as required.	Yes
<b>1.2.11</b>	<b>Wayleaves &amp; easements</b>	Services (initial report covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes - undertake and manage negotiations to a satisfactory outcome) acting on behalf of the Buyer in the grant of wayleaves (terminable) and easements (permanent) access agreements.	Yes
<b>1.2.12</b>	<b>Licences for alteration &amp; Landlords consent</b>	Acting on behalf the Buyer in granting or securing licence or consent from the Landlord to the tenant giving consent to carry out works or alterations at the property.	Yes
<b>1.2.13</b>	<b>Vertical Real Estate</b>	Services where applicable as listed above to solely support the management of vertical real estate.	No
<b>1.2.14</b>	<b>Arbitration services</b>	Arbitration services where required, for services listed above, if a final agreement cannot be made between relevant parties in relation to the acquisition or disposal of estate.	Yes
<b>1.2.15</b>	<b>BIM - Building Information Modelling</b>	BIM services, as defined at Call Off Contract by the Buyer.	Yes
<b>1.2.16</b>	<b>GSL - Government Soft Landings</b>	GSL services, as defined at Call Off Contract by the Buyer.	Yes
<b>1.3.0</b>	<b>Studies &amp; Surveys</b>		
<b>1.3.01</b>	<b>Development surveys, studies &amp; strategy</b>	Access appraisals	No
<b>1.3.02</b>		Archaeological investigation	No

<b>1.3.03</b>		Asbestos refurb/demolition survey	No
<b>1.3.04</b>		Cost monitoring in connection with overage agreements	Yes
<b>1.3.05</b>		Development appraisal	Yes
<b>1.3.06</b>		Development appraisal (Inc. consultancy and advice)	Yes
<b>1.3.07</b>		Development structures and partnering	Yes
<b>1.3.08</b>		Environmental impact assessments	No
<b>1.3.09</b>		Estate rationalisation and review	Yes
<b>1.3.10</b>		Feasibility study	Yes
<b>1.3.11</b>		General planning services (Inc. town and country)	Yes
<b>1.3.12</b>		Geotechnical investigation and subsoil testing	No
<b>1.3.13</b>		Land referencing	No
<b>1.3.14</b>		Market trends and rental forecasts	Yes
<b>1.3.15</b>		Measured survey	Yes
<b>1.3.16</b>		Private funding of rationalisation schemes and property projects	No
<b>1.3.17</b>		Property investment, appraisal, development monitoring and financial services	Yes
<b>1.3.18</b>		Regeneration and economic development	No
<b>1.3.19</b>		Risk transfer	No
<b>1.3.20</b>		Tax implications	No
<b>1.3.21</b>		Transfers and decommissioning	No

1.3.22		Whole life investment appraisals	Yes
1.3.23	<b>Technology based surveys, studies &amp; strategy</b>	Building information modelling	Yes
1.3.24		Digital advisory/consultancy	No
1.3.25		Digital twinning	Yes
1.3.26		Drone surveys	Yes
1.3.27		Government Soft Landings	Yes
1.3.28	<b>Environmental surveys, studies &amp; strategy</b>	Arboriculture surveys	No
1.3.29		BREEAM assessment	Yes
1.3.30		Carbon legislation compliance	Yes
1.3.31		Climate risk assessment	No
1.3.32		Ecology and biodiversity	No
1.3.33		Energy and carbon audits	Yes
1.3.34		Energy conservation	No
1.3.35		Energy efficiency services	No
1.3.36		Environmental advisory services	Yes
1.3.37		Environmental impact assessments	No
1.3.38		Environmental planning	No
1.3.39		Flood risk	No
1.3.40		Geothermal surveys	No
1.3.41		Habitat surveys and appraisal	No
1.3.42		Net zero carbon strategy	Yes

<b>1.3.43</b>		Sustainability advisory services	No
<b>1.3.44</b>		Sustainability and carbon management advice	No
<b>1.3.45</b>		Sustainability certification (e.g. BREEAM, SKA, ISO 14001)	Yes
<b>1.3.46</b>		Sustainability reporting & communications	No
<b>1.3.47</b>		Sustainability strategy	No
<b>1.3.48</b>		Waste consultancy	No
<b>1.3.49</b>	<b>Dilapidations surveys, studies &amp; strategy</b>	Dilapidation surveys - building surveying	Yes
<b>1.3.50</b>		EPC	Yes
<b>1.3.51</b>		Vendor survey	Yes
<b>1.3.52</b>	<b>Estate surveys, studies &amp; strategy</b>	Acoustic and vibrations consultancy	No
<b>1.3.53</b>		Air systems consultancy	No
<b>1.3.54</b>		Asset surveys	Yes
<b>1.3.55</b>		Backlog maintenance survey	No
<b>1.3.56</b>		Cladding survey	No
<b>1.3.57</b>		Conservation and preservation consultancy	No
<b>1.3.58</b>		Cost planning	No
<b>1.3.59</b>		Daylighting/ sun lighting/ overshadowing and rights of light	<b>Yes</b>
<b>1.3.60</b>		Defects diagnosis/building pathology	No
<b>1.3.61</b>		Disaster recovery risk assessment	No
<b>1.3.62</b>		Display energy certificates	Yes

<b>1.3.63</b>		Equality Act	No
<b>1.3.64</b>		Estates strategy & business development (Inc. estate strategic asset management plans)	Yes
<b>1.3.65</b>		Feasibilities and options appraisals	Yes
<b>1.3.66</b>		Fire advisory services	No
<b>1.3.67</b>		Glass/glazing assessments	No
<b>1.3.68</b>		Governance, funding and finance	No
<b>1.3.69</b>		Health and wellbeing assessments	No
<b>1.3.70</b>		Health and safety advisory services	No
<b>1.3.71</b>		Insurance related	No
<b>1.3.72</b>		Inventories/check-in check-out reports	Yes
<b>1.3.73</b>		Lease and warranty compliance	Yes
<b>1.3.74</b>		LED Lighting and controls	No
<b>1.3.75</b>		Legal compliance - building surveying	Yes
<b>1.3.76</b>		Life cycle planning and management	Yes
<b>1.3.77</b>		Lift consultancy	No
<b>1.3.78</b>		Lighting consultancy	No
<b>1.3.79</b>		Long term asset replacement (LTAR)	Yes
<b>1.3.80</b>		Materials testing e.g. concrete contamination survey	No
<b>1.3.81</b>		Mechanical, electrical, public health and lift survey	No
<b>1.3.82</b>		Noise control consultancy	No

<b>1.3.83</b>		Operational and efficiency improvement	No
<b>1.3.84</b>		Other neighbourly matters	Yes
<b>1.3.85</b>		Party wall awards	Yes
<b>1.3.86</b>		Planned maintenance survey	No
<b>1.3.87</b>		Policy and strategy advisory	Yes
<b>1.3.88</b>		Portfolio audits	Yes
<b>1.3.89</b>		Post occupancy evaluation	Yes
<b>1.3.90</b>		Property advisory Services	Yes
<b>1.3.91</b>		Property consultancy	Yes
<b>1.3.92</b>		Renewable project feasibility, design and installation	No
<b>1.3.93</b>		Risk evaluation and advisory	No
<b>1.3.94</b>		Six facet survey (NHS): Facet 1 - Physical condition survey (Fabric and M&E) Facet 2 - Statutory compliance audit (Inc. Fire) Facet 3 - Space utilisation audit Facet 4 - Functional suitability review Facet 5 - Quality audit Facet 6 - Environmental management audit	No
<b>1.3.95</b>		Snagging survey	No
<b>1.3.96</b>		Socio-economic consultancy	No
<b>1.3.97</b>		Specialist structural survey	No
<b>1.3.98</b>		Statutory compliance review (UK/devolved administrations)	Yes
<b>1.3.99</b>		Stock condition survey	Yes
<b>1.3.100</b>		Strategic advice, including the preparation and development of an estate strategy	Yes



<b>1.3.101</b>		Transformation and change management	No
<b>1.3.102</b>		Water hygiene and legionella risk assessment and consultancy services	No
<b>1.3.103</b>		Workplace assessments	No
<b>1.3.104</b>	<b>Procurement managed services</b>	Full end-to-end managed procurement service for the provision of facilities management (FM) Services for delivery on a national basis, using any relevant Authority framework agreements and any other public sector framework agreements as specified by the Buyer. The Supplier may also be requested to run an appropriate procurement acting as the agent of the Buyer and assist the Cabinet Office Controls review.	No
<b>1.3.105</b>		Contract management	No
<b>1.3.106</b>		Procurement & commercial strategy	No
<b>1.3.107</b>		Asset verification and condition surveys	Yes
<b>1.3.108</b>		Compiling asset information for population to the data pack, service matrix, cost models, KPIs and ITT documentation	Yes
<b>1.4.0</b>	<b>Valuation</b>		
<b>1.4.01</b>	<b>Valuation</b>	Valuations to be carried out fully in accordance with the latest edition of the RICS appraisal and valuation standards manual (the “red book”) and any of the Buyer’s accounting guidelines, as superseded or replaced.	Yes
<b>1.4.02</b>		Asset valuations; valuations for any other financial reporting purposes, including capital charges, undertaken in accordance with the prevailing accounting standards, as interpreted for the UK public sector and current professional standards guidance.	No
<b>1.4.03</b>		Marketing appraisal	No
<b>1.4.04</b>	<b>Compulsory purchase orders (CPO)</b>	Advise and/or management of the CPO process (Including Inquiry) to a successful outcome (formulation, resolution, referencing, making the order, notification and publicity, objections, inquiry, decision, possession and compensation)	Yes

<b>1.4.05</b>		Advice and/or management acting on behalf of the Buyer who owns or occupies land subject to a CPO, having regard to the crown exemption and protocol for cooperation with other public bodies.	No
<b>1.5.00</b>	<b>Business Rates</b>		
<b>1.5.01</b>	<b>General administration</b>	Provide professional advice, guidance, negotiation and assistance on domestic or non-domestic rating issues, including a proactive strategy to mitigate changes in liability arising from new buildings and alterations.	Yes
<b>1.5.02</b>		Develop and maintain a list of rating assessments for all the rating hereditaments where the Buyer is the ratepayer.	Yes
<b>1.5.03</b>		Checking rates bills for accuracy of fact and calculation.	Yes
<b>1.5.04</b>		Provide advice and guidance on revaluation of business rates (anticipated to be 2022) and any transitional arrangements.	Yes
<b>1.5.05</b>		Provide advice and guidance on business rates grants or holidays, because of COVID-19 or other rating reliefs available.	Yes
<b>1.5.06</b>	<b>Full payment management</b>	Checking and paying Buyer rate bills, ensuring liabilities are correct and mitigated to the fullest extent without going to appeal.	Yes
<b>1.5.07</b>		Provide forecasts or Buyer reporting requirements for budgeting or payment purposes, including apportionments for lettings and estimates for new buildings.	Yes
<b>1.5.08</b>		Cross reference rates payment demands amount with appeals lodged.	Yes
<b>1.5.09</b>	<b>Rating appeals</b>	Check, Challenge & Appeal (England) - Act on behalf of the Buyer as its authorised agent for the online Valuation Office Agency process for business rates.	Yes
<b>1.5.10</b>		Act on behalf of the Buyer for material change appeals for physical changes to their property.	Yes

<b>1.5.11</b>		Act on behalf of the Buyer for compiled list appeals for disputing the rateable value for a property or occupation.	Yes
<b>1.5.12</b>		Act on behalf of the Buyer for baseline liability appeals.	Yes
<b>1.5.13</b>	<b>Rating relief</b>	Act on behalf of the Buyer for rating relief (small business, rural, charitable, enterprise zones, exempted and empty buildings, hardship, transitional, retail discount and local newspaper reliefs).	No
<b>1.5.14</b>	<b>Rating audits</b>	Act on behalf of the Buyer on auditing historic and/or current rate refunds and rebates.	No

7.2. The following standards, guidance or practises for Total Estate Management advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- RICS professional standards and guidance, global conflicts of interest, 1st edition
- Code of practice service charge residential management code and additional advice to landlords, leaseholders and agents, 3rd edition
- Commercial property management in England and Wales RICS practice standards, UK 2nd edition, guidance note
- Government functional standard GovS 004: Property
- How to check and challenge your rateable value - gov.uk
- MHCLG - guidance on compulsory purchase process and the crichel down rules
- Procurement of facility management RICS professional statement, 1st edition, UK
- RICS dilapidations in England and Wales, 7th edition
- RICS Professional Guidance, England and Wales for alterations in commercial property, 2nd edition, Guidance note
- RICS professional guidance, dilapidations in Scotland, 2nd edition
- RICS professional guidance, UK Health and safety for residential property managers, 1st edition
- RICS professional guidance, UK rights of light, 2nd edition
- RICS professional standards and guidance, commercial real estate agency, 1st edition
- RICS professional standards and guidance, England and Wales code for leasing business premises, 1st edition
- RICS professional standards and guidance, England and Wales party wall legislation and procedure, 7th edition
- RICS professional standards and guidance, global code of measuring practice, 6th edition
- RICS professional standards and guidance, global real estate agency and brokerage, 3rd edition
- RICS professional standards and guidance, global real estate management, 3rd edition
- RICS professional standards and guidance, global surveying safely: health and safety principles for property professionals, 2nd edition
- RICS professional standards and guidance, global valuation of development property, 1st edition
- RICS professional standards and guidance, sector property asset management guidelines, 2nd edition

- RICS professional standards and guidance, surveys and technical due diligence of commercial property, 4th edition
- RICS professional standards and guidance, UK reinstatement cost assessment of buildings, 3rd edition
- RICS professional standards and guidance, UK residential real estate agency, 6th edition
- RICS professional standards and guidance, UK service charges in commercial property, 1st edition
- RICS professional standards and guidance, UK surveying assets in the built environment, 1st edition
- RICS professional standards and guidance, UK surveyors advising in respect of compulsory purchase and statutory compensation, 1st edition
- RICS professional standards and guidance, UK surveyors advising in respect of the electronic communications code, 1st edition
- RICS professional standards and guidance, UK valuation of rural property, 3rd edition
- RICS professional standards and guidance, UK whole life carbon assessment for the built environment, 1st edition
- RICS public sector property asset management guidelines, 2nd edition
- RICS Valuation - global standards ('red book global standards')
- RICS/IRRV/RSA code of practice, UK Rating consultancy, 4th edition, March 2017
- Strategic FM framework RICS guidance note, global, 1st edition
- UK commercial real estate agency RICS professional statement, UK 1st edition

## 8. Lot 2 - Estate (Property) Management

- 8.1. Operation and management to support the occupation of the central government and wider public sector estate, providing technical due diligence where required, including providing an oversight of the property to include policy, maintenance, capital works and strategic asset management plans.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:	Mandatory
2.01	<b>Estate, asset &amp; property management</b>	Asset management of the commercial, retail, industrial, residential, institutional, land, agricultural or other estate, integrating and liaising with current estate suppliers as necessary (including maximising revenue, managing maintenance and repair, interaction with occupiers and key service providers, budget management and forecasting).	Yes
2.02		Landlord management (including Landlord consents).	Yes
2.03		Tenant management.	Yes
2.04		Service charge management.	Yes
2.05		Energy management (bureau services).	No
2.06		Managing and delivering Buyer strategic asset management plans (SAMP), including sustainability performance of property assets (workplace technology systems may be used to monitor, report and display capacity, availability, usage and occupational trends through Ai and IoT solutions).	Yes
2.07		Managing statutory compliance and reporting of property assets (risk, fire safety and health and safety compliance).	Yes
2.08		Workplace planning and space optimisation including, but not limited to, demand assessment, capacity testing and performance of assets (including workplace technology systems to monitor, report and display capacity, availability, usage and occupational trends through Ai and IoT solutions).	Yes
2.09		Monitoring, improving, reporting and making recommendations on Buyer satisfaction of assets and occupier wellbeing, including post- implementation reviews of change programs, refurbishments, capital programs, works and day-to-day occupation.	Yes

2.10		Development, ownership and responsibility for managing the Buyer estate information within their own property database or suppliers, ensuring that its management and maintenance is real time, and that it shall interface and be compatible with the supplier's database for the estate.	Yes
2.11		Third party supplier management relating solely to Buyer occupations (development of contract registers and contract management on behalf of the Buyer who retain contract ownership).	No
2.12	<b>Treasury services</b>	Financial management, including checking, paying and reporting on Buyer service charges, insurance and rent, including general administration, as specified by the Buyer.	Yes
2.13	<b>Vacant property management</b>	Vacant property management, including regular visits and the provision of appropriate security measures.	Yes
2.14		Property guardianship - may include a property guardian who is a working professional, who protects a vacant property by occupying a shared living space under a non-exclusive licence agreement.	No
2.15	<b>Moveable equipment asset management</b>	Moveable equipment asset management - management, control and tracking of moveable assets.	No
2.16	<b>Estate management support services</b>	Onboarding and co-location services to support the sharing of estate between government departments.	Yes
2.17		Interdepartmental occupational management (e.g. MOTO) - acting on behalf of the Buyer in the development and management of cross- departmental agreements for sharing space.	Yes
2.18		Commercialisation services and strategies - identifying additional sources of income from assets.	No
2.19		Provision of workplace support services - H&S, risk management, display screen equipment assessments, incident management, first aiders.	No

2.20		Daylighting, sun lighting, overshadowing and rights of light - initial report, to be agreed with the Buyer, covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes. Undertake and manage negotiations to a satisfactory outcome, to be agreed with the Buyer.	Yes
2.21		Party Walls - Acting on behalf of the Buyer as the building owner or adjoining owner within the Party Wall Act 1996.	Yes
2.22		Wayleaves & easements - Services (initial report covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes, as agreed with the Buyer - undertake and manage negotiations to a satisfactory outcome) acting on behalf of the Buyer in the grant of wayleaves (terminable) and easements (permanent) access agreements.	No
2.23		Other neighbourly matters - initial report to be agreed with Buyer, covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes with respect to all boundary disputes or other neighbourly matters. Undertake and manage negotiations to a satisfactory outcome, to be agreed with the Buyer.	Yes

8.2. The following standards, guidance or practises for Estate (Property) Management advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- Commercial property management in England and Wales RICS practice standards, UK 2nd edition, guidance note
- RICS professional standards and guidance, UK service charges in commercial property, 1st edition
- Code of practice service charge residential management code and additional advice to landlords, leaseholders and agents, 3rd edition
- RICS professional standards and guidance, sector property asset management guidelines, 2nd edition
- RICS professional standards and guidance, commercial real estate agency, 1st edition
- RICS professional standards and guidance, global real estate management, 3rd edition
- RICS professional standards and guidance, UK surveying assets in the built environment, 1st edition
- RICS professional standards and guidance, UK surveyors advising in respect of the electronic communications code, 1st edition
- Government functional standard GovS 004: Property

## 9. Lot 3 - Agency & Lease Management

- 9.1. Management of freeholds or leaseholds to support the acquisition, occupation or disposal of the central government and wider public sector estate, providing technical due diligence where required.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:	Mandatory
3.01	<b>Acquisition</b> of Land, Freehold or Leasehold Property (includes letting or other commercial arrangements)	The preparation of lists of potential properties or land (including availability review of the government estate via the Government Property Agency); Assistance in identifying appropriate terms; Identification of any surveys that may be required; Advice on the most appropriate solution; Undertaking negotiations Agreeing appropriate terms and conditions; and Acquiring the recommended asset. Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
3.02	<b>Pre-acquisition survey</b> or more detailed technical due diligence inspection and report for freehold or leasehold property.	Detailed survey; Reviewing technical data available for the property; Planning restrictions; Operation and maintenance data; Organising environmental assessments; Considering implications for the building's potential use including occupancy capacity testing; Taking into account the suitability for the intended use.	Yes
3.03	<b>Acquisition outline feasibility study</b>	Provide services related to RIBA Stage planning 0, 1, 6 & 7.	Yes
3.04	<b>Rent reviews</b>	Initial report covering all significant facts setting out actions, negotiating strategies and anticipated outcomes Manage negotiations through to a satisfactory conclusion. Comprehensive final report to support a recommendation on a figure for settlement. Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes



3.05	<b>Lease breaks &amp; lease expiries</b>	Initial report covering all significant facts setting out actions, negotiating strategies and anticipated outcomes Manage negotiations through to a satisfactory conclusion. Comprehensive final report to support a recommendation. Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
3.06	<b>Lease renewals &amp; lease regear</b>	Initial report covering all significant facts setting out actions, negotiating strategies and anticipated outcomes Manage negotiations through to a satisfactory conclusion. Comprehensive final report to support a recommendation including support preparing lease exemption request (LER) business cases, if required Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
3.07	<b>Disposal</b> 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)	Initial report with budget costs, valuations, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks. Marketing and disposal Final recommendation report, including any need for claw back, with advice on amounts and mechanism. Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
3.08	<b>Lease consents</b>	Initial report with budget costs, valuations, forecast incomes, anticipated outcomes and timings which take into account market conditions and risks. The Supplier shall take full account of the Buyer's best interest, the statutory position, the Buyer's estate strategy, business needs, condition of the building, dilapidation liabilities and the state of the market. Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes

3.09	<b>Lease surrender &amp; regrant</b>	Initial report covering all significant facts setting out actions, negotiating strategies and anticipated outcomes Manage negotiations through to a satisfactory conclusion. Comprehensive final report to support a recommendation including support preparing lease exemption request (LER) business cases, if required Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required	Yes
3.10	<b>Dilapidations</b>	Preparation - obtain all relevant documentation Inspection Preparation of schedule of claim Quantified demand Response and negotiation Recommendation and settlement (if applicable) Liaising with the Buyer's solicitors and with other relevant professionals providing all reasonably necessary input as required.	Yes
3.11	<b>Wayleaves &amp; easements</b>	Services (initial report covering all significant facts, setting out actions, negotiation strategies and anticipated outcomes - undertake and manage negotiations to a satisfactory outcome) acting on behalf of the Buyer in the grant of wayleaves (terminable) and easements (permanent) access agreements.	Yes
3.12	<b>Licences for alteration &amp; Landlords consent</b>	Acting on behalf the Buyer in granting or securing licence or consent from the Landlord to the tenant giving consent to carry out works or alterations at the property.	Yes
3.13	<b>Vertical Real Estate</b>	Services where applicable as listed above to solely support the management of vertical real estate.	No
3.14	<b>Arbitration services</b>	Arbitration services where required, for services listed above, if a final agreement cannot be made between relevant parties in the relation to the acquisition or disposal of estate.	Yes
3.15	<b>BIM - Building Information Modelling</b>	BIM services as defined at Call Off Contract by the Buyer.	Yes

3.16	<b>GSL - Government Soft Landings</b>	GSL services as defined at Call Off Contract by the Buyer.	Yes
------	---------------------------------------	--	-----

9.2. The following standards, guidance or practises for Agency & Lease Management advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- UK commercial real estate agency RICS professional statement, UK 1st edition
- RICS professional standards and guidance, UK residential real estate agency, 6th edition
- RICS professional standards and guidance, global real estate agency and brokerage, 3rd edition
- RICS professional standards and guidance, England and Wales code for leasing business premises, 1st edition
- RICS dilapidations in England and Wales, 7th edition
- RICS professional guidance, dilapidations in Scotland, 2nd edition
- RICS public sector property asset management guidelines, 2nd edition
- RICS professional standards and guidance, UK surveying assets in the built environment, 1st edition
- RICS professional standards and guidance, global code of measuring practice, 6th edition
- RICS professional guidance, UK health and safety for residential property managers, 1st edition
- RICS Professional Guidance, England and Wales for alterations in commercial property, 2nd edition, guidance note
- Code of practice service charge residential management code and additional advice to landlords, leaseholders and agents, 3rd edition
- Government functional standard GovS 004: Property

## 10. Lot 4 – Surveying and Strategic Advice

10.1. Provision of surveys, studies and strategic advice to support the occupation of the central government and wider public sector estate, providing technical due diligence where required.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:	Mandatory
4.01	Development surveys, studies & strategy	Access appraisals	No
4.02		Archaeological investigation	No
4.03		Asbestos refurb/demolition survey	No
4.04		Cost monitoring in connection with overage agreements	Yes
4.05		Development appraisal	Yes
4.06		Development appraisal (Inc. consultancy and advice)	Yes
4.07		Development structures and partnering	Yes
4.08		Environmental impact assessments	No
4.09		Estate rationalisation and review	Yes
4.10		Feasibility study	Yes
4.11		General planning services (Inc. town and country)	Yes
4.12		Geotechnical investigation and subsoil testing	No
4.13		Land referencing	No
4.14		Market trends and rental forecasts	Yes
4.15		Measured survey	Yes
4.16		Private funding of rationalisation schemes and property projects	No

4.17		Property investment, appraisal, development monitoring and financial services	Yes
4.18		Regeneration and economic development	No
4.19		Risk transfer	No
4.20		Tax implications	No
4.21		Transfers and decommissioning	No
4.22		Whole life investment appraisals	Yes
4.23	<b>Technology based surveys, studies &amp; strategy</b>	Building information modelling	Yes
4.24		Digital advisory/consultancy	No
4.25		Digital twinning	Yes
4.26		Drone surveys	Yes
4.27		Government soft landings	Yes
4.28	<b>Environmental surveys, studies &amp; strategy</b>	Arboriculture surveys	No
4.29		BREEAM assessment	Yes
4.30		Carbon legislation compliance	Yes
4.31		Climate risk assessment	No
4.32		Ecology and biodiversity	No
4.33		Energy and carbon audits	Yes
4.34		Energy conservation	No
4.35		Energy efficiency services	No
4.36		Environmental advisory services	Yes

4.37		Environmental impact assessments	No
4.38		Environmental planning	No
4.39		Flood risk	No
4.40		Geothermal surveys	No
4.41		Habitat surveys and appraisal	No
4.42		Net zero carbon strategy	Yes
4.43		Sustainability advisory services	No
4.44		Sustainability and carbon management advice	No
4.45		Sustainability certification (e.g. BREEAM, SKA, ISO 14001)	Yes
4.46		Sustainability reporting and communications	No
4.47		Sustainability strategy	No
4.48		Waste consultancy	No
4.49	<b>Dilapidations surveys, studies and strategy</b>	Dilapidation surveys - building surveying	Yes
4.50		EPC	Yes
4.51		Vendor survey	Yes
4.52	<b>Estate surveys, studies &amp; strategy</b>	Acoustic and vibrations consultancy	No
4.53		Air systems consultancy	No
4.54		Asset surveys	Yes
4.55		Backlog maintenance survey	No
4.56		Cladding survey	No

4.57		Conservation and preservation consultancy	No
4.58		Cost planning	No
4.59		Daylighting/ sun lighting/ overshadowing and rights of light	No
4.60		Defects diagnosis/building pathology	No
4.61		Disaster recovery risk assessment	No
4.62		Display energy certificates	Yes
4.63		Equality Act	No
4.64		Estates strategy and business development (Inc. estate strategic asset management plans)	Yes
4.65		Feasibilities and options appraisals	Yes
4.66		Fire advisory services	No
4.67		Glass/glazing assessments	No
4.68		Governance, funding & finance	No
4.69		Health and wellbeing assessments	No
4.70		Health and safety advisory services	No
4.71		Insurance related	No
4.72		Inventories/check in check out reports	Yes
4.73		Lease and warranty compliance	Yes
4.74		LED Lighting and controls	No
4.75		Legal compliance - building surveying	Yes
4.76		Life cycle planning and management	Yes

4.77		Lift consultancy	No
4.78		Lighting consultancy	No
4.79		Long term asset replacement (LTAR)	Yes
4.80		Materials testing e.g. concrete contamination survey	No
4.81		Mechanical, electrical, public health and lift surveys	No
4.82		Noise control consultancy	No
4.83		Operational & efficiency improvement	No
4.84		Other neighbourly matters	No
4.85		Party wall awards	No
4.86		Planned maintenance survey	No
4.87		Policy and strategy advisory	Yes
4.88		Portfolio audits	Yes
4.89		Post occupancy evaluation	Yes
4.90		Property advisory services	Yes
4.91		Property consultancy	Yes
4.92		Renewable project feasibility, design and installation	No
4.93		Risk evaluation and advisory	No
4.94		Six facet survey (NHS): Facet 1 - Physical condition survey (Fabric & M&E) Facet 2 - Statutory compliance audit (Inc. Fire) Facet 3 - Space utilisation audit Facet 4 - Functional suitability review Facet 5 - Quality audit Facet 6 - Environmental management audit	No



4.95		Snagging survey	No
4.96		Socio-economic consultancy	No
4.97		Specialist structural survey	No
4.98		Statutory compliance review (UK/devolved administrations)	Yes
4.99		Stock condition survey	Yes
4.100		Strategic advice, including the preparation and development of an estate strategy	Yes
4.101		Transformation and change management	No
4.102		Water hygiene and legionella risk assessment and consultancy services	No
4.103		Workplace assessments	No
4.104	<b>Procurement managed services</b>	Full end-to-end managed procurement service for the provision of facilities management (FM) Services for delivery on a national basis, using any relevant Authority framework agreements and any other public sector framework agreements as specified by the Buyer. The Supplier may also be requested to run an appropriate procurement acting as the agent of the Buyer and assist the Cabinet Office Controls review.	No
4.105		Contract management	No
4.106		Procurement and commercial strategy	No
4.107		Asset verification and condition surveys	Yes
4.108		Compiling asset information for population to the data pack, service matrix, cost models, KPIs and ITT documentation.	Yes

10.2. The following standards, guidance or practises for Surveying and Strategic advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- UK commercial real estate agency RICS professional statement, UK 1st edition
- RICS public sector property asset management guidelines, 2nd edition
- RICS professional standards and guidance, global surveying safely: health and safety principles for property professionals, 2nd edition
- RICS professional standards and guidance, surveys and technical due diligence of commercial property, 4th edition
- RICS professional standards and guidance, global code of measuring practice, 6th edition
- RICS professional guidance, UK rights of light, 2nd edition
- RICS professional standards and guidance, England and Wales party wall legislation and procedure, 7th edition
- RICS professional standards and guidance, UK whole life carbon assessment for the built environment, 1st edition
- RICS professional standards and guidance, UK surveying assets in the built environment, 1st edition
- RICS professional standards and guidance, UK reinstatement cost assessment of buildings, 3rd edition
- Procurement of facility management RICS professional statement, 1st edition, UK
- Strategic FM framework RICS guidance note, global, 1st edition
- RICS professional guidance, UK Health and safety for residential property managers, 1st edition
- Government functional standard GovS 004: Property

## 11. Lot 5 - Valuation and Compulsory Purchase Orders

11.1. Valuation of built, physical, mechanical and electrical assets ranging from desktop to red book methodologies to comply with IFRS, RICS or departmental internal accounting procedures and compliance for central government and wider public sector estate, including services to support compulsory purchase orders.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:	Mandatory
5.01	<b>Valuation</b>	Valuations to be carried out fully in accordance with the latest edition of the RICS appraisal and valuation standards manual (the "red book") and any of the Buyer's accounting guidelines, as superseded or replaced.	Yes
5.02		Asset valuations; valuations for any other financial reporting purposes, including capital charges, undertaken in accordance with the prevailing accounting standards, as interpreted for the UK public sector and current professional standards guidance.	No
5.03		Marketing appraisal.	No
5.04	<b>Compulsory purchase orders (CPO)</b>	Advise and/or management of the CPO process (Including Inquiry) to a successful outcome (formulation, resolution, referencing, making the order, notification and publicity, objections, inquiry, decision, possession and compensation).	Yes
5.05		Advice and/or management acting on behalf of the Buyer who owns or occupies land subject to a CPO, having regard to the crown exemption and protocol for cooperation with other public bodies.	No

11.2. The following standards, guidance or practises for valuation services, advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- MHCLG - guidance on compulsory purchase process and the crichel down rules
- RICS Valuation - global standards ('red book global standards')
- RICS professional standards and guidance, UK valuation of rural property, 3rd edition
- RICS professional standards and guidance, global valuation of development property, 1st edition
- RICS professional standards and guidance, UK surveyors advising in respect of compulsory purchase and statutory compensation, 1st edition
- RICS public sector property asset management guidelines, 2nd edition
- Government functional standard GovS 004: Property

## 12. Lot 6 - Business Rating Services

12.1. Provision of rating support (Inc. payment) and rating appeal services as per Check, Challenge & Appeal process for England, and the rateable value services for Wales, Scotland and Northern Ireland for central government and wider public sector estate.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a Landlord or Tenant, which include, but are not be limited to:	Mandatory
6.01	<b>General administration</b>	Provide professional advice, guidance, negotiation and assistance on domestic or non-domestic rating issues, including a proactive strategy to mitigate changes in liability arising from new buildings and alterations,	Yes
6.02		Develop and maintain a list of rating assessments for all the rating hereditaments where the Buyer is the ratepayer.	Yes
6.03		Checking rates bills for accuracy of fact and calculation.	Yes
6.04		Provide advice and guidance on revaluation of business rates (anticipated to be 2022) and any transitional arrangements.	Yes
6.05		Provide advice and guidance on business rates grants or holidays, because of COVID-19 or other rating reliefs available.	Yes
6.06	<b>Full payment management</b>	Checking and paying Buyer rate bills, ensuring liabilities are correct and mitigated to the fullest extent without going to appeal.	Yes
6.07		Provide forecasts or Buyer reporting requirements for budgeting or payment purposes including apportionments for lettings and estimates for new buildings.	Yes
6.08		Cross reference rates payment demands amount with appeals lodged.	Yes
6.09	<b>Rating appeals</b>	Check, Challenge & Appeal (England only) - Act on behalf of the Buyer as its authorised agent for the online Valuation Office Agency process for business rates.	Yes

6.10		Act on behalf of the Buyer for material change appeals for physical changes to their property.	Yes
6.11		Act on behalf of the Buyer for compiled list appeals for disputing the rateable value for a property or occupation.	Yes
6.12		Act on behalf of the Buyer for baseline liability appeals.	Yes
6.13	Rating relief	Act on behalf of the Buyer for rating relief (small business, rural, charitable, enterprise zones, exempted & empty buildings, hardship, transitional, retail discount and local newspaper reliefs).	No
6.14	Rating audits	Act on behalf of the Buyer on auditing historic and/or current rate refunds and rebates.	No

12.2. The following standards, guidance or practises for business rates advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- RICS/IRRV/RSA code of practice, UK Rating consultancy 4th edition, March 2017
- RICS Valuation - global standards ('red book global standards')
- RICS public sector property asset management guidelines, 2nd edition
- Government Functional Standard GovS 004: Property
- How to check and challenge your rateable value - gov.uk

### 13. Lot 7 - Integrated Workplace Management

13.1. The purpose of the IWM Lot is to allow the Buyer to develop a single point of contact (In-house under the light option or service delivery partner under the full Integrator option) to instruct and monitor the provision of those Services delivered by third party suppliers, and to facilitate asset, building and property data and management information to enable the Buyer to make informed decisions to support capital investment, estate strategy and cost/resource optimisation.

Service Line	High Level Description	The Supplier shall provide the following Services, acting on behalf of the Buyer either as a landlord or tenant, which include, but are not limited to:	Mandatory
7.01	<b>System</b> - support operational and strategic Workplace Management as configured to the Buyer's requirements and shall provide the required IT systems, application hosting, implementation, training, support and security for the management of the Services.	Functional requirements - configure the System to the Buyer requirements which shall be the focus of the delivery of the Workplace Management Services via task or work orders, providing an interface and or integration with all associated systems used across the Buyer estate to provide a single, all-encompassing view.	Yes
7.02		Helpdesk Interaction - system links to the helpdesk, Buyer and third-party suppliers to provide the functionality to deliver all requirements detailed in the Call Off Contract.	Yes
7.03		Building asset management and tracking - system provides the Buyer and its suppliers with integrated asset management functionality, including, but not limited to, a detailed Asset register, tracking and trend analysis capability.	Yes
7.04		Building matrix - detailing occupations, services, applicable suppliers and services standards.	Yes
7.05		Cost control - system provides cost control functionality including estimating, verification, benchmarking,	Yes

		reporting, audit capability and payment services.	
7.06		End-to-end management of planned, condition based, reactive, statutory, periodic or billable ad hoc works, maintenance projects including scheduling and any other work orders relating to the occupation of property.	Yes
7.07		Property management functionality - system includes a property management functionality, to be defined by the Buyer in the Call Off Contract.	Yes
7.08		Landlord responsibilities - the supplier shall ensure that the system has the functionality to identify work orders associated with the affected property that are the responsibility of the landlord.	Yes
7.09		Access - system shall be able to provide multiple user types and profile levels, to be defined by the Buyer in the Call Off Contract.	Yes
7.10		File repository - files and folders should be easily located within the system via the use of a structured folder and file system/repository.	Yes
7.11		IT service management - recognised framework for accepted IT service management best practice such as ITIL (IT Infrastructure Library).	Yes
7.12		System to achieve necessary client security accreditation at Call Off Contract.	Yes

7.13	<b>Helpdesk</b> – The Supplier shall provide a Helpdesk facility, which shall be the single point of contact for all Service Users in relation to all Workplace, Property and FM related Service requests.	An appropriately staffed, qualified, Buyer intelligent and supervised helpdesk service aligned to the system shall be specified by the Buyer at Call Off Contract stage' The helpdesk shall provide a single point of contact for service users in relation to all property/facilities management related service requests.	Yes
7.14		The capture, monitoring and escalation of active requests.	Yes
7.15		Buyer satisfaction monitoring and complaints handling.	Yes
7.16		Helpdesk promotional activities for example, building user surveys.	Yes
7.17		Flexible and comprehensive reporting.	Yes
7.18		Support of the system for use by the Buyer and third-party suppliers, to manage the Buyer's assets and work orders through to completion, to plan and record maintenance regimes and to manage sustainability activities e.g. energy, water and waste performance.	Yes
7.19		The recording, reporting and analysis of their performance and self-monitoring of the helpdesk services.	Yes
7.20	<b>Performance Management, Analysis and Reporting</b> - The Supplier shall have the capability to provide a comprehensive and flexible reporting solution to cover the functional, operational and strategic aspects.	Industry standard contract, FM and property reports.	Yes
7.21		Performance measurement, exception and statistical reporting.	Yes



7.22		Expert analysis reports including recommended improvements and associated corrective actions.	Yes
7.23		Ad hoc reporting requirements.	Yes
7.24		Self-service reporting capability.	Yes
7.25		Helpdesk performance measurement and reporting.	Yes
7.26		Performance measurement reporting (of suppliers).	Yes
7.27		Buyer satisfaction surveys.	Yes
7.28		Financial reporting.	Yes
7.29		Statistical information reporting.	Yes
7.30		Sustainability management – energy, water and waste management.	Yes
7.31	<b>Innovation, technology &amp; data</b>	Workplace technology systems to manage, monitor, report and display capacity, availability, usage, staff wellbeing and occupational trends through Ai and IoT solutions.	Yes
7.32		Development and interaction with other property related platforms to provide a holistic view to estate and facilities management.	Yes
7.33		Development and scheduling of maintenance strategies (e.g. Smart maintenance) and property events that align with technological and data developments.	Yes
7.34	<b>Additional services</b>	Business process and transition consultancy services.	Yes

7.35		Provision of workplace support services - H&S, Risk Management, display screen equipment assessments, incident management, first aiders.	No
7.36		Assurance and compliance (service audits and cost) - integrated audit and assurance service to include commercial audit of work orders, invoice line items and KPI deductions of suppliers and the conduct of a rolling programme of "holistic" building, project and FM service audits.	No
7.37		Contingency planning and disaster recovery - coordination of business continuity and disaster recovery (BCDR) including ensuring business continuity plans for buildings and FM suppliers are maintained, up-to -date and accessible, coordinating tests of BCDR plans and supporting the Buyer to enact BCDR plans when required.	Yes
7.38		End to end (procurement strategy to contract management Inc. payment of invoices) purchasing service for estates related goods and services as per the Public Contracts Regulations 2015.	No
7.39		Project management services to support Buyer minor and major works.	No
7.40		Asset management - strategic plans, asset management, registers condition surveys and long-term asset replacement (LTAR).	No

7.41		Building Information Modelling (BIM) services, to be defined by the Buyer in the Call Off Contract.	Yes
7.42		Government Soft Landings (GSL) services, to be defined by the Buyer in the Call Off Contract.	Yes

13.2. The following standards, guidance or practises for integrated workplace management advice and delivery may apply, or subsequent versions, including variations for England, Wales, Scotland or Northern Ireland:

- UK commercial real estate agency RICS professional statement, UK, 1st edition
- RICS public sector property asset management guidelines, 2nd edition
- RICS professional standards and guidance, global surveying safely: health and safety principles for property professionals, 2nd edition
- RICS professional standards and guidance, surveys and technical due diligence of commercial property, 4th edition
- RICS professional standards and guidance, global code of measuring practice, 6th edition
- RICS professional standards and guidance, UK whole life carbon assessment for the built environment, 1st edition
- RICS professional standards and guidance, UK surveying assets in the built environment, 1st edition
- Procurement of facility management RICS professional statement, 1st edition, UK
- Strategic FM framework RICS guidance note, global, 1st edition
- RICS professional guidance, UK Health and safety for residential property managers, 1st edition
- Government functional standard GovS 004: Property