

WWF-UK Request for Proposal for Estates Strategy

Background – WWF-UK Strategy

The environmental impact of human activity on both nature and climate now threatens the survival of all life on our planet. Since 1970, we have seen a calamitous decline in vertebrate wildlife population sizes of, on average, 68%. Over the next decade, we face a triple challenge; to meet the needs of a growing human population against a backdrop of a dramatically changing climate and a biodiversity crisis across land and sea.

Underpinned by science, WWF-UK's strategic vision is that **by 2030 nature's vital signs are improving – we will have halted the loss of nature**. We are working to avoid the sixth mass extinction of life on our planet. If we are to 'bend the curve' on nature loss, we need to inspire people and institutions to tackle the greatest threats to nature and the future of our planet.

This is a **Fight for Our World** and we will focus on the following Impact Goals:

1. Accelerate the transition to a sustainable and just global food and agriculture system;
2. Avert dangerous climate change and safeguard the Polar Regions for people and nature; and
3. Protect and restore threatened habitats and species and improve rights of communities and indigenous peoples.

To achieve this impact, we need to deliver the following enabling Goals:

4. Grow support for our work and better enable our supporters to act with us; and
5. Be an inclusive, agile, accountable and continuously learning organisation with a shared mission.

Finally, all work must keep in mind or contribute towards our charitable objectives:

- a. the promotion of conservation of the natural environment and the sustainable use of natural resources and ecological processes, to include without limitation, fauna and flora, water, soils and other natural resources
- b. the promotion of education in nature conservation, the natural environment and the sustainable use of natural resources
- c. the promotion and support of scientific and educational studies, research and projects and publication of scientific and educational works. In each case for the benefit of the public

Background – Estates Strategy

WWF-UK currently has four offices and approximately 480 staff. These are:

- Woking (The Living Planet Centre, see <https://www.wwf.org.uk/get-involved/living-planet-centre>) with 220 desks. This is a purpose-built office, including public spaces for education purposes. There are approximately 445 staff allocated to the office, with an additional 55 WWF International staff who hire desks.
- The Tun in Edinburgh with 16 desks. This is a leased agreement which expires on 31/3/24. There are currently 14 staff allocated to the Edinburgh office.
- Churchill House in Cardiff with 12 desks. This is a leased agreement which expires on 9/11/23. There are currently 12-15 staff allocated to the Cardiff office.

Commented [RM1]: Do we need to make clear here (or maybe it is elsewhere) whether the estate consists of owned or leased property? I was expecting to see a little more background info about each of the properties.

Commented [LW2]: This excludes quiet booths and flexible spaces

Commented [CW3]: @Melanie Laithwaite Hi Mel, please can you confirm this is correct? Do you have the paperwork available to include the review?

Commented [ML4R3]: @Charlotte Wyatt the hosting agreement does not specify number of desks so I would just say here "who hire desks" and leave it at that for now.

Commented [CW5R3]: Thanks Mel!

- Somerset House in London with 12 desks. The London Hub isn't a fixed base for staff but rather a touchdown space with a separate boardroom style meeting room. There are no staff allocated to London as their office base. The lease is due to expire on 31/5/25, with a 6-month break clause up to 30th November.

All offices have a hot desk system in place for all staff, with no allocated desk, although there are often hubs/areas which teams congregate in, except for Front of House staff in Woking and the London Hub, who are fixed in the reception area. Each office space also has meeting rooms and breakout spaces for meetings and collaborating.

Balancing the needs of individuals, teams and the organisation, we are implementing a hybrid working policy which will be fully in place from 1st November 2022. The policy comes with a minimum expectation of 20% of working time in the office per month. All colleagues have a nominated place of work within their contract, assigned by their 'home' directorate; we have no '100% home workers'. All colleagues are UK based, although we have a small number of individuals working for WWF-UK and hosted by one of our international offices.

With the move to remote working since the start of the pandemic in March 2020 followed by a hybrid approach, we need to review our Estates to ensure we are being financially sustainable and being cost effective in managing our estate while enabling our staff to work at their best. We want to work in a way which maximises our organisational effectiveness.

There will be three distinct streams of work:

- a. design an estates strategy that will deliver the aim above
- b. implement the estates strategy – including quick wins
- c. in the interim (runs in parallel with i), do some estates improvements that are either future-proof or good value for money in the meantime

This invitation to tender is to support with only part (i) above, including identifying any quick wins.

To do this, we are commissioning a consultant to:

- (a) Perform a situational analysis of how staff are currently using the office, what other organisations are doing, and evaluating the environmental impact of the current hybrid working policy (considering office occupancy, commuting and working from home). Much of this information has already been collected and can be provided.
- (b) Create recommendations for each office space, and for an overarching estates strategy for the organisation to be delivered by December 2022, though interim decisions on some offices may happen sooner. This will cover whether the buildings and locations are correct, consider ownership vs leasing, and any workspace changes needed particularly focusing on enabling our hybrid working approach. It will address both short-term wins and longer-term planning, including anything which needs to be put in place up to 2030 and beyond. Indications of costs, priorities, impact and risk should be given.
- (c) Support the creation of the strategy from the agreed recommendations.

The goal is to have a clear strategy for each of our Estates that we are confident has been fully considered from all angles, including organisational effectiveness, recruitment and retention, staff wellbeing, environmental impact, economic efficiency and sustainability, and ultimately enables our hybrid working approach. From this point, the organisation will take forward the implementation of the strategy, and the scope of the consultant ends.

The Requirements of an Agency

The chosen partner will be able to work with us in the following way:

The primary objective of the project is to create an Estates Strategy identifying how we will deliver estates that will enable us best to deliver our corporate strategy productively, enabling teams to flourish in line with our values, support wellbeing and enable recruitment and retention. The strategy will identify what office spaces we want and how we will use them in a complementary way to home working to support our hybrid working approach. The strategy for each of our estates needs to consider organisational and cost effectiveness, recruitment and retention, staff wellbeing, environmental impact, economic efficiency and sustainability. The estates strategy should provide sustainable and modern workplace solutions that enables our overall strategy.

The work we anticipate needing to be done can be broken down into the following elements:

1. **Schedule:** To identify what support is needed from WWF-UK and create a schedule for the project, including what information needs to be provided by WWF-UK to facilitate this along the way.
2. **Report:** To produce a report which summarises where we are now, considering the points below. This will give us a common base point to then make decisions for moving forward. Much of the information has already been collected by the organisation and can be shared with the consultant. This should include:
 - 2.1. **Situational analysis:** To include a STEEPLED analysis (or similar including the social impact of our estates), mapping the environmental and economic impact of our Estates (compared to what they could be), what other organisations are doing, occupancy rates, workplace mapping, workplace culture, value for money of each office space, how the offices are impacting organisational effectiveness and cross-team working, our public space use and commitments to public education. Are the offices and their locations fit for purpose? Consideration should be given to different national contexts.
 - 2.2. **Legal:** To work with our engaged property law firm in understanding our commitments to local councils, donors, reviewing lease agreements and chain of title for each office space, construction warranties on the LPC, and a review of our obligations to ensure appropriate safeguarding for all staff, workers and visitors, with especial focus on children and vulnerable visitors to our estates.
 - 2.3. **Diversity, Equality and Inclusion:** reviewing current impacts on diversity and inclusion, accessibility of each space, and highlighting where we can strengthen our estates.
 - 2.4. **Recruitment and retention:** To include impacts on new starters and existing staff at different careers stages, comparative assessment of potential and existing office locations and the needs they have at different stages of their career development. The impact on diversity and inclusion in recruitment should also be considered.
 - 2.5. **Staff views:** To include focus groups and gathering evidence of staff behaviour as well as their desires moving forwards. It's hugely important that current staff are given the opportunity to share their views and to incorporate these where possible. Our staff consultation body – our Forum Council – will play a key part in employee consultation.
 - 2.6. **Local impact:** To assess what we bring to the communities around our office spaces, consider options for ways of growing relationships, and to understand how we can help the communities nearby become more sustainable and more impactful.
3. **Recommendations:** This is the focus of the commissioned work and is the key part support is required for. The report should conclude with thorough recommendations for what to do with the estates, particularly to enable our hybrid working approach: this could include recommendations for office locations, leasing, buying, how the interior and exterior of our estates could be used, partners, and internal design. All

Commented [CW6]: Do we want to add something around community value of LPC: assess how it adds value to Woking as a community space and visitor attraction, and what it could do better to improve WWF-UK brand in local area and help achieve our mission?

Commented [DD7R6]: Yes, I think we should. There are different views as to our impact locally - I think we need to have an objective and accurate assessment of what we bring to Woking as a community, and what (if any) obligations that places upon us.

Commented [RM8R6]: I completely agree with this Charlotte, although more from best practice principles than a brand perspective, I would like us to consider our relationship with people in Woking (and also ask the question in Wales and Scotland) and think about how we can help each community become more sustainable and more impactful.

Commented [RM9R6]: I don't know STEEPLED, but I'd phrase this as adding the social/societal impact of our estates?

Commented [ML10]: Just a thought - do we also want to assess community view on our estates, ie what do supporters in immediate proximity think of WWF UK and what could the estates do better for them and for our mission?

Commented [LW11R10]: I think the environmental is covered in the PESTLE in point 1

Commented [LW12R10]: Agree with the point about community - the LPC is a visitor attraction for the Woking area (was this part of our peppercorn rent

Commented [LC13R10]: this wouldn't apply to our devolved offices

Commented [LW14]: Should there also be a consideration of workplace culture?

Commented [ML15]: we should include here the consideration of our public space use and commitments to public education

Commented [LC16]: consideration of sharing working spaces with other like minded organisations for best value?

Commented [CW17]: @Melanie Laithwaite I'm wondering if we reword this now that we're going to

Commented [ML18R17]: @Charlotte Wyatt including that they will work with our engaged firm works really well

Commented [CW19R17]: Great, thank you Mel!

Commented [ML20]: lease agreements and freehold chain of title

Commented [RM21]: Could we / should we add something about career stages? I am not sure if the

Commented [RM22R21]: I like the balance between current and future staff - is there more to add here or

Commented [RM23]: Reading through - and understanding we don't want to prejudice what someone might suggest - I didn't get a clear sense of

recommendations should include the implications of implementing them on costs, environmental impact and staff. It will address both short-term wins and longer-term planning and reflect our organisational values. Risks and issues of each proposal, or choosing not to implement it, should be included.

- 3.1. Exploration of options:** Where appropriate, alternative options should be explored, including benefits of sharing spaces with other like-minded organisations for added value. We want to be sure that we have the best spaces available to us to meet our needs, in line with value for money.
- 3.2.** Consider existing decision-making framework and propose improvements as needed to enable efficient decision-making.
- 4. Strategy:** To create a strategy document in collaboration with the WWF-UK project team with the accepted recommendations. This may include recommendations for communicating to staff, stakeholders, donors, partners and supporters.

We welcome proposals which explore relevant issues not covered above and different approaches to this work, if the above information is covered. Changing our hybrid working policy is out of scope for this project: we are seeking the path forward which best enables this way of working for the organisation.

Our project timeline is ambitious, seeking to have a strategy to share in February 2023. Our London office lease has a break clause up to 30th November, so, if possible, an informed decision will be made before this.

In their response, an external partner must be able to demonstrate and evidence:

1. Understanding of the brief and propose options for the approach. *Please outline possible time frames and requirements of us in a high-level project plan.*
2. Depth and breadth of expertise in this field in the charity /not for profit / NGO and commercial / private sectors. *Please include names of recent clients for who you have delivered similar work.*
3. A strong team that can provide responsive service – i.e., not key person dependent – continuous service available. *Please provide short biographies for all those who would be involved on the project*
4. A strong alignment with WWF's vision, mission and environmental targets with values that respect diversity, equality and inclusivity and evidence of partnership working. *Please provide a short statement on this and how you evidence your values in your work.*
5. Value for money; competitive pricing for expertise. We need fees to be clear and structured in a flexible way. *Please state day / hourly rates and price per project element, ideally with capped fees.*
6. Confidentiality and Data protection. *Please provide your confidentiality statement and GDPR principles.*
7. Diversity, Equality and Inclusivity (DE&I). *Please share your approach to DE&I and how you would approach the project in this respect.*
8. References. *Please provide two referee clients.* (We would not approach without your permission).
9. It is our preference that an appointed external partner adopts our standards terms and conditions for engaging with us. [These are attached.] *Please can you state whether or not you would be comfortable with this and whether or not there are any terms which might create difficulty for you.*

The Selection Process

In line with our procurement process, we are inviting proposals from any interested organisations in the next fortnight (to ensure we get at least 3 responses) who might be able

Commented [CW24]: Remove? TBC

Commented [ML25R24]: @Charlotte Wyatt Per latest info - leave in now

Commented [CW26R24]: Great, thank you!

Commented [LC27]: useful to share when all leases are up for timescales?

Commented [LW28]: Could we also add "and environmental targets"?

Commented [ML29]: Which T&Cs did you have in mind to attach? Probably best to prepare some bespoke consultancy ones which I can do - let's discuss

Commented [CW30R29]: I was going to use the standard Supplier T&Cs but happy to create bespoke ones: what do you think @Sara Muller?

to provide the above services. [A panel] comprising the Project Lead, Project Sponsor, Project Manager, the Procurement Manager, Head of Legal, and Head of Facilities will consider the responses and make a decision based on the following criteria, with approximate weightings shown:

- a. 25%: The organisation's proposed approach to the 9 points above**
- b. 20%: Depth and breadth of expertise as evidenced by recent client work**
- c. 20%: Values, partnership, inclusivity – alignment with WWF**
- d. 35%: Price – value for money**

[Timelines and Next Steps]

This RFIQ was issued during w/c 26/09/22.

Any potential providers can speak to Charlotte Wyatt (cwyatt@wwf.org.uk) with any queries, during w/c 10/10/22.

We request that all responses are returned to us by 28/10/22.

A decision will be made as soon as possible with a view to the project starting as soon as possible.

Thank you for expressing an interest in working with and supporting WWF-UK with this important piece of work. We look forward to receiving your response.

Commented [CW31]: Suggested participants:

- Catherine, project sponsor
- David, project lead
- Sara, procurement
- Claire, facilities
- Mel, legal
- Charlotte, PM

Do we want anyone from finance?

Commented [DD32R31]: Possibly, if Sara is purely looking at procurement. What would we ask someone from Finance to specifically consider?

Commented [CW33]: Update dates once confirmed