**Call-Off Schedule 28**

**Specification (Statement of Requirement)**

**Part 1 – General Information**

**Training Estate Support Contract**

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1. **Introduction**
	1. The role of the MOD (the Buyer) is to protect the people of the UK, prevent conflict, be ready to fight our enemies. The Defence Infrastructure Organisation (DIO) is the part of the MOD that provides and maintains infrastructure, including Total Facilities Management (TFM) services. The provision of TFM services is a key enabler in the support of operational capability, by contributing to the health and safety of Armed Forces personnel, their motivation and their satisfaction. TFM services provide the benign environment that overlays and incorporates the physical infrastructure to support personnel when not on operations, while recuperating or training and is therefore key to maintaining an effective operational capability.
	2. TFM services are a feature in all Training Estate locations where defence people live, work or conduct training. Service demands change depending on the particular customer, its role, geographical location and local environmental factors. Consequently, the supply of the Services must be flexible in nature to match particular requirements and also adaptable to changing circumstances; such as the Better Defence Estates Strategy. The benefits of achieving greater commonality in Services across FDIS contracts and better packaging of TFM services, must be balanced against the ability to deliver local variances in order to best meet local needs, recognising that ‘one size does not fit all’.
	3. The Training Estate is unique in its Requirements to support the training activities across the UK and Overseas. It requires Hard FM services to maintain the physical infrastructure, Soft FM to provide the catering, cleaning and hotel type services, Rural Estate services and the unique support services to enable training delivery and a Safe Place to Train for Buyer staff and the maintenance of public safety across the Training Estate. These TFM services are expanded upon within this Part of this Schedule and further defined across the relevant Parts of this Schedule and other Call-Off Schedules.
	4. The Services provided by the Supplier shall be capable of adapting to the changing needs and expectations of our Customers, the Government and other stakeholders. Through this Contract, the Buyer is seeking to transform the way that the Services are provided to the defence community. The Supplier shall ensure that technological innovations and advances are fully embraced, increasingly ensuring, at all times, that industry norms and best practice is delivered.
2. **Core Values**
	1. The DIO’s core values underpin its vision and mission. They support delivery and shape how the Buyer and Supplier shall work together, as follows:
		1. **Safety First.** Safety first in everything we do.
		2. **Collaboration.** Working in partnership.
		3. **Integrity.**  Doing the right thing, not just the easy thing.
		4. **Agility.** Moving at pace to meet new demands.
		5. **Accountability**. Delivering on your promises.
		6. **Enthusiasm**. Passionate about what we do and spirited in how we do it.
3. **Outcomes and Success Measures from the Contract**
	1. The Buyer sets out below the following outcomes it expects from the Contract and the measures of success which will be core to success.
	2. **Outcomes:**
		1. Long term collaborative relationship.
		2. High customer satisfaction.
		3. Excellent quality customer service delivery.
		4. Compliance with statutory requirements and legislation.
		5. First class operational delivery.
		6. Sustainable innovation and continuous improvement.
		7. Application of smart building technology.
		8. Support to Asset Management maturity.
		9. Excellent financial management.
		10. Value for money.
		11. Demonstrable contribution to corporate social responsibility.
		12. Insightful reporting.
		13. Effective mobilisation of sites.

* 1. **Success Measures:**
		1. Presenting credible, realistic and sustainable innovation opportunities positively impacting on user productivity and asset efficiency.
		2. Delivery of information, insight and solutions, to the customer to inform decision making and extending the life of the asset.
		3. Improved customer satisfaction over time.
		4. 100% statutory compliance.
1. **The Armed Forces Covenant**
	1. The Armed Forces Covenant is a public sector pledge from Government, businesses, charities and organisations to demonstrate their support for the Armed Forces community. The Covenant was brought in under the Armed Forces Act 2011 to recognise that the whole nation has a moral obligation to redress the disadvantages the Armed Forces community face in comparison to other citizens, and recognise sacrifices made.
	2. The Covenant’s two principles are that:
		1. the Armed Forces community should not face disadvantages when compared to other citizens in the provision of public and commercial services.
		2. special consideration is appropriate in some cases, especially for those who have given most such as the injured and the bereaved.
	3. The Buyer encourages all bidders, and their suppliers, to sign the Corporate Covenant, declaring their support for the Armed Forces community by displaying the values and behaviours set out therein. The Buyer encourages you to make your [Armed Forces Covenant pledge](https://www.gov.uk/government/publications/corporate-covenant-pledge). The Corporate Covenant gives guidance on the various ways you can demonstrate your support.
2. **The Training Estate**
	1. The Buyer intends to award a single contract for the Training Estate.
	2. Through this contract the Supplier shall support the Defence Infrastructure Organisation on the UK Defence Training Estate in meeting the training needs of users.
	3. The Supplier shall deliver Hard and Soft Facilities Management (FM), rural management of the estate and the Training Services that support the Safe Place to Train.
	4. The Supplier shall deliver a total facilities management contract maintaining statutory compliance of the estate keeping it safe and legal to use, fit for UK Defence and better for the society of the nation.
	5. The Supplier shall provide Overseas Training Estate support as defined in this Schedule Part 15 - TAROM.
	6. The UK Training Estate currently consists of circa 74 Establishments and circa 8,921 level 2 assets. Occupying in the region of two hundred thousand hectares, taking up circa 1% of the UK land mass.
	7. A map of Training Estate Regional Headquarters and Training Estate Brigade Areas are shown at Annex 1A and 1B respectively.
	8. Full detail of all Level 2 Assets in scope of the Contract is contained in the Buyer Supplied Information (BSI).
	9. Over the term of the Contract it is expected that there will be significant changes in the size and shape of the defence estate as a result of the Better Defence Estate Strategy (BDES) and other initiatives. This includes delivering plans to optimise the use of the estate and rationalise assets.
	10. There is also a strategy to improve the management of data, moving towards one reliable and accurate set of data used multiple times, and it is likely that automation and technological advancements could offer significant opportunities to support the better delivery of the Services. The Supplier will be required to work collaboratively, reacting to advances in technological capability, to deliver one reliable and accurate set of data used multiple times.
3. **Sustainability**
	1. The UK Government is committed to developing, procuring and managing the disposing of goods and services sustainably; and delivering on the UN Global Goals for Sustainable Development. The MOD is a key stakeholder in realising its delivery.
	2. By conducting Defence tasks on a sustainable footing, long-term resilience is supported across a wide range of activities and locations. Mainstreaming of sustainability principles is mandated within Defence business to ensure that environmental, social and economic threats, impacts and opportunities are fully taken into account in all strategies, policies, decision-making processes and associated programmes, projects, activities and behaviours.
	3. The MOD has a fundamental policy objective that those who deliver or conduct Defence activities protect the environment when undertaking those activities. This policy applies to all organisations and persons within Defence who conduct or support Defence activities.
4. **Schedule 28 Constituent Parts**
	1. The Table of Services contained in Annex 1B – Schedule 28 Table of Services summarises the constituent parts of Schedule 28 and their contents. Core Services across the Affected Property are highlighted in the green and orange boxes, green addressing the Built Estate, orange covering services specific to the Training Estate and the blue boxes to Non-Core services and Billable Works.
	2. In summary:
		1. Parts 1 to 11 cover the Core requirements for Hard Facilities Management (HFM), including Billable Works.
		2. Part 12 contains the Non-Core requirements
		3. Parts 13 to 16 contain Core Requirements that are specific to the Training Estate
		4. **NOT USED.** Part 17 covers Land Management Services (LMS) Lettings and Lease requirements
		5. Part 18 contains the additional requirements for RAF Spadeadam which are not covered in Parts 1 to 16.
5. **The Requirement**
	1. The Requirement is broken down into three areas:
		1. **Core Service**.

* + - 1. The Core Service is non-discretionary services required to keep the Affected Property safe, legal and operational. Parts 1-11 and 13 to 18 of this Schedule contain the requirements that constitute the Core Service. This includes:
				1. All testing, inspections and servicing in accordance with Statutory and Mandatory and Planned Preventative Maintenance (PPM) requirements, as defined in this Schedule, Part 5 – Statutory and Mandatory Obligations
				2. All associated repairs and reactive maintenance to be delivered through an Inclusive Repair Threshold (IRT) which is defined in Call-Off Schedule 5: Call-Off Pricing.
				3. Training Areas Operation and Management in support of a Safe Place to Train.
				4. All Soft FM Services and Rural Estate Reactive and Planned Maintenance.
				5. All management services associated with the delivery of the requirements including provision of Helpdesk facilities, as set out in Part 2: Helpdesk of this Schedule.
				6. Professional Services (including Design services) for all Billable Works included up to Value Band 2.
				7. Sustainable development to include the effective consumption of utilities, specifically the reduction of carbon and water consumption and waste production, and proactive engagement on the Net Zero Carbon agenda.
			2. The following requirements in the IRT Table below, are not subject to the IRT such that all costs shall be covered by the Supplier:

 **IRT Table**

|  |
| --- |
|  |
| Grounds Maintenance |
| Snow and ice clearance |
| Statutory designated nature conservation sites - maintenance work identified for statutory designated nature conservation sites. |
| Scheduled Monuments - maintenance work identified for scheduled monuments |
| Forestry – maintenance work identified in the annual programme for forestry assets |
| Kitchen Deep Cleaning |
| Provision of Accommodation |
| Training Areas and Ranges Operation and Management (TAROM) |
| Rural Estate Maintenance (REM) – Preventative Maintenance |
| Soft FM |

* + 1. **Non-Core Services**.
			1. The Non-Core Services are discretionary services that can be called off on an annual basis to meet specific Buyer needs. Part 12: Non-Core Services and PPM of this Schedule contains the Non-Core Services requirements.
		2. **Billable Works.**
			1. Billable Works are delivered in accordance with this Schedule Part 11: Billable Works and Call-Off Schedule 5: Call-Off Pricing.
	1. The Supplier shall be aware that where a potential conflict arises in the delivery of the services then Parts 13 to 18 of this Schedule will take precedence over Parts 1 to 12 to ensure the delivery of the training Allocation unless the non delivery of the services in Parts 1 to 12 presents a health and safety issue to the training Allocation or prevents the Affected Property from being kept in a Statutory and Mandatory condition.
	2. The Supplier shall have a common understanding of the Contract with the Buyer and deliver the Services to a consistent standard throughout the Affected Property. The full detail of the Services to be provided is set out in this Call-Off Schedule and other relevant Contract Call-Off Schedules.
	3. The Supplier shall have overall responsibility for the delivery of requirements described in this Schedule twenty-four (24) hours a day and three hundred and sixty-five (365) days per annum across the Affected Property.

* 1. UK Training Estate does not operate under standard working hours . Users can be allocated facilities, ranges and training areas at any time should the operational need arise, but generally speaking, usage aligns to the timings illustrated in respective Standing Orders. As such, Working Hours of Buyer and Supplier staff directly supporting Allocations are dictated by the relevant Allocation and assets shall be made available when Allocated. Camp based support staff, including HQ and support functions, would typically work a 8am – 5pm day.
	2. The Supplier through its work, actions and advice shall support Operational output by keeping the Affected Property in a Compliant and fit for use condition.
1. **MOD** **SFG20**
	1. The Supplier shall deliver the Services contained in this Schedule in accordance with MOD SFG20, manufacturer’s instructions, Good Industry Practice, or to any other standard approved in writing by the Buyer. This shall be the standards precedence hierarchy applied by the Supplier when maintaining the Affected Property.
	2. The Buyer’s introduction of MOD SFG20 into its maintenance regime provides an opportunity for the Supplier to collaborate with the Buyer to transform the management of maintenance services applied to the Estate. The Supplier shall carry out all UK Statutory, MOD Mandatory tests, inspections, servicing and all other maintenance tasks as stipulated in MOD SFG20 unless stated otherwise in Part 5: Statutory and Mandatory Obligations of this Schedule.
2. **Asset Management**
	1. The Buyer is in the process of developing its capability to better inform and advise customers through the adoption and development of its asset management capability in line with Good Industry Practice. Based on ISO:55000, the Buyer has adopted an approach to asset management that recognises its role to “inform and advise” which is aligned to the customer role to “understand and decide” and is shown in the Buyer Asset Management Development Cycle graphic flow chart.
	2. An organisational change programme has been launched to continue to develop the Buyer’s approach and capability over the next few years. The Project Initiation Document for the Asset Management Programme has been provided within the BSI for further understanding.

**Buyer Asset Management Development Cycle**



* 1. One of the core principles of asset management, and a building block for everything else, is understanding cost, performance and risk. The Buyer currently has a low level of understanding of some aspects of risk (observed condition) and performance (utilisation) and is committed to develop its coverage and sophistication in all of these areas over the next few years. The Supplier shall be the primary provider of data to allow the Buyer to develop its asset management capability. The Supplier shall fully populate and maintain the asset data required for the Buyer to fulfil their asset management advisor role. The Supplier shall work with the Buyer to fully populate and maintain these asset data requirements and bring sector innovation to the contract on methods of capture, maintenance and operational insights.
	2. The Supplier shall play a pivotal role in assisting the Buyer to mature as the Asset Management technical defence authority. The Supplier shall support engagement through attendance at both the joint Asset Management Function Working Group and at the Strategic Supplier Group. The key role of the Supplier at these Groups shall be to bring forward opportunities, emerging sector innovation, case studies and demonstrate site trials. This will complement the Buyer sharing internal thinking and priorities, including Government direction.
	3. The Supplier shall support the Buyer in the development of a Data Quality Development Plan, including the setting of data quality targets. The plan will focus on addressing the completeness, accuracy, validity and timeliness of infrastructure Asset Data from Level 0 down to Level 4. The plan shall be aligned with the Suppliers’ intervention schedules and plans such that asset data is captured, updated or validated at the time of intervention so that over the first few years of the contract the asset data quality shall be improved minimising the requirement for special data capture programmes or visits.

1. **Ways of Working**
	1. The Supplier shall deliver all Services in accordance with the principles of ISO:44001 – Collaborative Business Relationship Management Systems in a manner to complement the Buyer's Supplier Relationship Management Strategy and Corporate Relationship Management Plan, as set out in Call-Off Schedule 24: Collaboration.
	2. In order to realise collaborative business opportunities, the Supplier shall take account of the Buyer’s organisational structure and geographical locations in order to maximise efficiency of the delivery of services described within the Contract.
	3. The Supplier shall co-locate with the Buyer's staff at Buyer specified locations such as regional and area offices as defined in the BSI or as otherwise agreed with the Buyer.
	4. The Supplier shall perform a Relationship Maturity Measurement exercise with its supply chain partners and the Buyer every six (6) months as set out in the Joint Relationship Management Plan (JRMP) in accordance with Call-Off Schedule 24: Collaboration. This is to gain three hundred and sixty (360) degree feedback on business relationships and identify continuous improvement activities that will improve overall relationship management.
	5. The Joint Partnering Board will convene at least six (6) monthly to discuss overall contractual performance as part of the Supplier Relationship Management Strategy. To inform this exercise the Supplier will be issued with a trust matrix and required to submit it in accordance with the guidance provided.
	6. The Supplier shall provide representatives for the various levels of the Suppliers Association (strategic and working level) and contribute to the work arising from it.
	7. The Supplier shall work with other suppliers delivering services to the Buyer to engender innovation. As part of this the Supplier shall be expected to participate in Buyer Best Practice Forums. The purpose of the Best Practice Forums will be to facilitate cross-Supplier knowledge transfer so that lessons learned and innovations identified in one Supplier can be shared across the supplier base.
	8. The Forum will be scheduled periodically and will include all suppliers and key personnel from the Buyer as well as key supply chain partners when appropriate. The outputs of the forum will be part of the continuous improvement process and the Supplier shall be expected to attend, where appropriate, and to ensure the learning and best practice are implemented across their Contract.
	9. The Supplier shall provide sustainable access to industry intelligence and technical proficiency.
	10. The Supplier shall utilise its own Computer Aided Facilities Management (CAFM) system and meet the requirements of this Schedule, Part 3: Information Systems and Data Management to ensure delivery of data and management information to the Buyer, and to identify opportunities and issues, bring solution thinking, insight and intelligence to make the data meaningful and support decision making.
	11. The Supplier shall increase customer satisfaction by meeting and exceeding the Performance Measures contained in Call-Off Schedule 14: Performance Management.
	12. The Supplier shall seek every opportunity to support the wider government agenda including for social, ethical and environmental initiatives and generate immediate or future benefits for the Buyer.
2. **Transition**
	1. The Supplier shall manage the transition to the Contract and shall implement full Service Delivery at the In-Service Date (ISD) to meet the requirements of Part 4: Contract Mobilisation - Demobilisation of this Schedule and Call-Off Schedule 13: Mobilisation Testing and Plan.
3. **Management of the Service**
	1. The Supplier shall manage the outputs required under the Contract and shall keep in place an appropriate organisational structure to support the operational delivery and management of a safe, legal and operational Estate throughout the duration of the Contract. The Supplier shall provide effective management and leadership at all levels of the Service.
	2. The Supplier shall ensure that all Supplier’s staff undertaking work against the Contract are skilled, competent and appropriately trained and follow all relevant professional codes of practice, standards, guidelines, regulations and directives, applicable to their specialist area. All staff are to be qualified for their role.
	3. The Supplier shall ensure that all staff undertaking work against the Contract, both permanent and temporary, receive relevant induction, site familiarisation and training for their role.
4. **Achievement of Value for Money**
	1. The Supplier shall at all times seek to optimise the achievement of Value for Money to the Buyer. This is both for the Services delivered directly under the Contract, and for related Services carried out by Third Parties, which are influenced by the Supplier’s actions. In achieving Value for Money the Supplier shall ensure the needs of the Buyer are met.
5. **Performance Management**
	1. The Supplier shall meet extant Performance Measures specified at Call-Off Schedule 14: Performance Management throughout the term of the Contract. The Supplier’s dedicated contract Compliance Manager shall provide accurate and validated data on activity and performance, in mutually agreed formats, and facilitate processing and comparison with historic information to track trends over time. The Supplier shall be responsible for the collection and generation of the full range of data required by the Buyer to support this activity.
	2. The Supplier shall attend contractual performance meetings as specified in Call-Off Schedule 15: Contract Management.
6. **Annexes**
	1. Annex 1A – Training Estate Regional HQ Map
	2. Annex 1B – Training Estate Brigade Areas Map
	3. Annex 1C – Schedule 28 Table of Service



