

**RM6168: Estate Management Services Order Form Template**

**Call of Contract for Support Services for Challenging 2023 Business Rates**

**Contract Reference: C381418**

**Order Form Template**

This Order Form is for direct awards for the provision of the Deliverables which form part Framework Contract RM6168: Estate Management Services as outlined in section 4.3 of Framework Schedule 1 and Annex A of Framework Schedule 1 only.

**Part 1: Buyer and Supplier to complete**

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| **Buyer Name** | UK Health Security Agency |
| **Buyer Contact** | Matthew Nardella |
| **Buyer Address** | 10 South Colonnade Canary Wharf London E14 4PU |
| **Buyer’s Authorised Representative** | Graeme Sutherland |

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| **Supplier Name** | Avison Young |
| **Supplier Contact** |  |
| **Supplier Address** | 3 Brindley Place, Birmingham, B1 2JB |
| **Registration Number:** | 06382509 |
| **DUNS Number** | 210158990 |
| **Payment Method** | BACs |
| **Supplier’s Authorised Representative** |  |
| **Supplier’s Contract Manager** |  |
| **Commercially Sensitive Information** | None |

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| **Framework Ref** | RM6168 |
| **Call-Off Lot** | Business Rating Services |
| **Estate Management Services**  | Rating appeals |
| **Call-Off (Order) Ref** | C381418 |
| **Call-Off (Order) Date** | Final date of signature by both Avison Young and UKHSA |
| **Call-Off Charges** | Buyer Guidance |
| **Call-Off Start Date** | Final date of signature by both Avison Young and UKHSA |
| **Call-Off Expiry Date** | 30th April 2033. |
| **Extension Period** | None |
| **Maximum Liability**  | The limitation of liability for this Call-Off Contract is stated in Clause 11.2 of the Core Terms. |
| **Progress Report Frequency** | Quarterly |
| **Progress Meeting Frequency** | Quarterly |

**CALL-OFF INCORPORATED TERMS**

The documents listed in Part 2 of the Order Form under the heading “Call-Off Incorporated Terms” are incorporated into this Call-Off Contract and the order of precedence listed. Where numbers are missing those schedules are not incorporated into the Call-Off Contract.

No other Supplier terms are part of the Call-Off Contract. This includes any terms that have either been written on the back of, or added to, this Order Form, or presented to the Buyer at the time of Delivery.

**DELIVERABLES**

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| **The requirement** |
| **2023 Checks, Challenges and Appeals (CCA)** Avison Young will assist UKHSA with the administration requirements of the Government Gateway (the Valuation Office Agency’s (VOA) online portal) in terms of claiming UKHSA’s properties and completing any returns that are required or may be introduced throughout the life of the 2023 Rating List. Significant changes to the system are likely to be introduced during the 2023 Revaluation, in preparation for the 2026 Revaluation. These are at the Consultation stage, but Avison Young anticipate ratepayers will be required to complete an annual return for each property confirming whether there have been any ‘relevant’ changes to the property e.g physical changes, rent reviews/ new leases etc. In addition, whenever there are ‘relevant changes’, the ratepayer will be required to notify the Valuation Officer at the time of the event and provide further details as appropriate. Avison Young will also advise on rating issues, an appeal strategy and proceed through the CCA process by; * Maintaining an accurate database with UKHSA’s relevant property details e.g. Rating List addresses, rateable values and business rates liabilities.
* Provide budget estimates of your future rates liabilities.
* Attend review meetings, as appropriate.
* Advise and assist UKHSA if changes are introduced during the course of the 2023 Revaluation. If UKHSA require Avison Young to undertake the formal notification process for UKHSA, (as outlined above), Avison Young will discuss with UKHSA an additional fee which do not exceed Avison Young’s time charge rates.
* Check and Challenge 2023 List rateable values where warranted.
* Negotiating with the VO to secure rateable value reductions wherever possible.
* Reporting on the settlement of each Check, Challenge or Appeal and the financial outcome of Avison Young’s actions.
* Where necessary and with UKHSA’s instruction, attend Valuation Tribunal hearings on UKHSA’s behalf.
* Keep UKHSA fully informed of the progress of the case and evaluate the decision of the Tribunal.
* Check the accuracy of rate refunds and interest payments.

**Material Change Appeals** Avison Young will work with UKHSA to identify all possible material change opportunities, which include but are not limited to; * Site changes (refurbishment, demolition, extension)
* Splits
* Mergers
* Nearby roadworks or building schemes
* Changes of use or occupation

**Specialist Initiatives** In addition to the above Avison Young will employ expert knowledge to identify other ways to generate savings, which include but are not limited to; * Reliefs and Exemption
* Empty and partly empty property
* Legislative changes, and
* Billing errors
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**PERFORMANCE OF THE DELIVERABLES**

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| **Key Staff** |
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| **Key Subcontractors** |
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**For and on behalf of the Supplier:**

**For and on behalf of the Buyer:**

**Part 2 – Other Applicable Terms**

CALL-OFF INCORPORATED TERMS

The following documents are incorporated into this Call-Off Contract. Where numbers are missing, then the schedules do not apply. If the documents conflict, the following order of precedence applies:

1. This Order Form including the Call-Off Special Terms.
2. Joint Schedule 1 (Definitions and Interpretation) **RM6168**
3. The following Schedules in equal order of precedence:

Joint Schedules for **RM6168**

* Joint Schedules for **RM6168**
* Joint Schedule 2 (Variation Form)
* Joint Schedule 3 (Insurance Requirements)
* Joint Schedule 4 (Commercially Sensitive Information)
* Joint Schedule 6 (Key Subcontractors)
* Joint Schedule 7 (Financial Difficulties)
* Joint Schedule 8 (Guarantee)
* Joint Schedule 9 (Minimum Standards of Reliability)
* Joint Schedule 10 (Rectification Plan)
* Joint Schedule 11 (Processing Data)

Call-Off Schedules for **RM6168**

* Order Form- Template-Short-Form
* Call-Off Schedule 1 (Transparency Reports)
* Call-Off Schedule 5 (Pricing Details)
* Call-Off Schedule 7 (Key Supplier Staff)
* Call-Off Schedule 9 (Security)
* Call-Off Schedule 12 (Clustering)
* Call-Off Schedule 13 (Implementation Plan and Testing)
* Call-Off Schedule 15 (Call-Off Contract Management)
* Call-Off Schedule 18 (Background Checks)
* Call-Off Schedule 20 (Call-Off Specification)

1. CCS Core Terms (version 3.0.10)
2. Joint Schedule 5 (Corporate Social Responsibility) **RM6168**

No other Supplier terms are part of the Call-Off Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

REIMBURSABLE EXPENSES

None

**Supplier Charges**

