**Selection Questionnaire (SQ) Project Brief**

**The Crown Estate**

**Lot 1: Public Affairs and Engagement Agency**

**Lot 2: Corporate Communications Agency**

**SQ/ITT/Contract information:**

**Route to Market:** Restricted Procedure

**Expected commencement date:** November/December 2024

**Contract length:** 2 years with 1 + 1 year extension options.

**Contract form:** Framework

**Use of the Framework:** Mini Competition or Direct Award, exclusive to The Crown Estate only.

**ITT Documents:** to follow shortly.

**Attachments to the SQ for supplier completion**: “SQ Response Document- Public Affairs & Corp Comms” (excel)

**Introduction**

By a Contract Notice placed in the Find a Tender Service (FaTS) (the Contract Notice) and a Contracts Finder notice, The Crown Estate invites tenders from suitably qualified and experienced Suppliers to provide various Technical Services for The Crown Estate Marine (the Project).

This is a Restricted Procedure conducted in accordance with the Public Contracts Regulations 2015 (SI 2015/102) (as amended) (the Regulations).

The Crown Estate invites Suppliers to submit an SQ responses for Technical Services for the Project as detailed in this SQ Project Brief, which comprises the following documents:

**Sections within this SQ**

1. Background to The Crown Estate
2. Background to this SQ
3. Responding to the SQ
4. SQ Evaluation Criteria & Evaluation Example
5. Indicative SQ Timeline
6. Portal
7. Communications Protocol
8. Confidentiality
9. Freedom of Information
10. Final Decision and Award
11. **Background to The Crown Estate**

Dating back more than 260 years, The Crown Estate is a unique business with a diverse portfolio. We actively own and manage land and the seabed around England, Wales, and Northern Ireland.

The Crown Estate was established by an Act of Parliament in 1961. As an independent commercial business, we are tasked with generating profit for the Treasury for the benefit of the nation’s finances. This has totalled £4bn over the last 10 years. www.thecrownestate.co.uk.

Our business is made up of four Strategic Business Units:

1. London: With a portfolio spanning 10 million sq. ft, we are one of the West End’s largest property owners. Comprising Regent Street and around half of St James’s, our offer extends across the workplace, retail, dining, leisure, and residential sectors. Our challenge is to become an urban renewal leader and support the rebuild of London post COVID-19, to ensure it maintains its relevance as a global city.
2. Marine: As the manager of the seabed around England, Wales, and Northern Ireland, we play a key role in enabling the UK’s offshore wind industry, and facilitate the development of sectors such as cables, pipelines, CO2 storage, and marine aggregates. We work in partnership with our customers and stakeholders to help the country optimise the economic, environmental, and social potential of the marine environment, supporting its long-term sustainable development.
3. Regional: Our Regional portfolio has a broad range of assets that includes retail and leisure destinations, as well as industrial and business parks. We also have a significant holding of mixed-use and strategic land opportunities. Our focus is on supporting economic development through reshaping and activating our portfolio for the long term. Currently the assets are 86% weighted to the retail and leisure sectors.
4. Windsor & Rural: The Windsor Estate (including Windsor Great Park, Savill Gardens, Virginia Water) extends to over 16,000 acres and is a working rural estate including forestry, horticulture, tourism, residential and commercial property activities. Windsor Great Park attracts approximately 6m visits a year – the Estate need to manage the balance of the need to protect the park with the public demand for access.

We also hold over 125,000 acres of farmland across England, and more than 50,000 acres of upland and Commons interests across Wales and Cumbria. We are reviewing our rural holdings to assess both its potential for broader value and as an opportunity for environmental and ecological best practice.

**Purpose, values and corporate strategy**

Our purpose is to create lasting and shared prosperity for the nation. This intersects with what the world around us needs and where we believe we can contribute. It sets out our ambition and the meaningful role we want to play beyond our return of profit to Treasury.

Our purpose ensures that we deliver social and environmental value alongside financial return. We believe our role is to add real value today while also creating something better for future generations – some of our endeavours will be specifically for the long term.

Our corporate strategy is for The Crown Estate to be a leader in supporting the UK towards a net zero carbon future and to take a leading role in stewarding the UKs natural environment and biodiversity. Our Marine strategy sets out an ambitious programme to de-risk, optimise and accelerate the development of the seabed. We have an important role to play to catalyse the UK towards a net zero future, delivering a thriving marine environment and bridging the gaps between sectors.

Our values define our culture and guide our behaviours, they also tell our stakeholders, partners, and customers how we do business and what they can expect from us:

**Caring**: We are committed to looking after the world around us and each other. That’s why we are stewards: we seek to take care of people, reflect on our actions, and carefully consider long-term impacts. To leave a positive legacy for generations to come, we treat people, places and the environment with the care and respect they need to thrive.

**Together**: We work together and with others to deliver on our purpose. That’s why we focus on building strong collaborative relationships with our customers, stakeholders, and communities. To build trust, we focus on understanding the real needs of those around us.

**Creative**: We believe that creativity enables us to unlock new ideas and solve problems. That’s why we strive for an inclusive culture where diverse perspectives and approaches are encouraged. To be a true catalyst for change, we embrace original thinking and the best ideas.

**Impactful**: We believe that positive impact and financial performance must go hand in hand. That’s why we challenge ourselves to deliver the key social, environmental, and financial factors that underpin prosperity. In always striving to add value, we ask ourselves how our actions align with our purpose and make a meaningful difference.

You can read more about these in our Annual Report: [Annual Report 2023/24 | The Crown Estate](https://www.thecrownestate.co.uk/about-us/annual-report)

1. **Background to this SQ**

The Crown Estate has undergone a significant and ongoing transformation in the last four years with a strategy to play a nationally significant role in some of the key challenges facing the country where it can have a meaningful impact: net zero and energy security, nature recovery, inclusive communities, and economic growth. This transformation has evolved The Crown Estate to work in an open and proactive engagement approach which it needs to continue to evolve and innovate to deliver business objectives and to protect the Licence to Operate. As an organisation accountable to Parliament, The Crown Estate must continue to build understanding and credibility to deliver on its strategy whilst continuing to build this understanding credibly in devolved nations and English Regions.

In order to support this strategy we would like to appoint an agency(s) for the following areas:

1. **Public Affairs and Engagement agency** to support The Crown Estate to build and manage its relationships and activity amongst key stakeholders and across its key markets through its public affairs and engagement activities. This includes Public Affairs, stakeholder engagement utilising a broad range of tactics, policy analysis and development, message development and report writing. The agency will primarily support TCE activity in energy (in particular marine industries and offshore renewables) and Property sectors (focusing on planning and development across commercial property, housing, regeneration and built environment).
2. **Corporate Communications agency** to support The Crown Estate to build and manage its reputation amongst key stakeholders and across its key markets through its external communications activities. This includes, but is not limited to, media relations, social media, website, narrative and key message development. The main objectives are to grow reputation by increasing awareness and understanding of the organisation, its role and the impact it has for the nation.

**Lot 1- Public Affairs and Engagement Agency**

We are looking for an agency that can support us in four main ways:

* Public Affairs and Engagement Strategy design and delivery aligned with overall business objectives in 1) UK Parliament and Whitehall, 2) English regions and to support and deliver activities in devolved nations outside Welsh Public Affairs agency scope, 3) public bodies, 4) non-Government stakeholders 5) civil society
* Strategic and proactive engagement programmes to support business objectives / strategy, and project scopes
* Policy analysis and development for property and outside current retained agency scope. Current retained agencies include but are not limited to, Corporate Communications, Welsh Public Affairs, Welsh Strategic Counsel, Strategic Energy Political and Legislative Counsel and Planning consultants.
* Production of business reports and innovative supporting materials with supporting engagement programmes.

**Lot 2: Corporate Communications Agency**

Through insights with its key audiences, The Crown Estate has identified that greater understanding and visibility of its brand will lead to greater favourability and credibility to deliver on its strategy.

We are looking for an agency that can support us in two main ways:

1. Strategic Corporate Communications advisory – in particular:

* Narrative development
* Strategic corporate communications counsel, including issues management
* Integrated communications campaigns – strategy, content and implementation
* CEO and exec team profiling, communications and engagement, including conferences and speaking opportunities
* Media Training and leadership coaching
* Digital communications strategy
* Media analysis and insights

1. PR and social media delivery – support to deliver communications strategies and campaigns including:

* Creating materials and content
* Selling-in news stories
* Managing social media
* Media monitoring
* Social listening
* Securing interviews and speaking opportunities

1. **Responding to the SQ**
   1. The document “SQ Response Document- Public Affairs & Corp Comms” contains detailed instructions on how to respond to this SQ. Please ensure this document is completed thoroughly and accurately. Failure to do so may result in being withdrawn from the SQ process.
   2. Suppliers are invited to respond to any number of the Lots.
   3. There shall be a clarification window for suppliers to ask clarification questions regarding the SQ, please see the ‘SQ Indictive Timetable’ for specific dates. All questions should be communicated via the Portal, see ‘Communications Protocol’ for full details.
   4. The specific type of services will be specified further at ITT stage.
2. **SQ Evaluation and example**

The standard SQ questions which will be assessed on a pass/fail basis, based on whether the correct and complete information has been provided. **Should suppliers fail on any of the standard questions, they will be excluded.**

Supplier responses to Part 3, Section 7 in attachment “SQ Response Document- Public Affairs & Corp Comms” will be scored from 0- 5 as stated in Table one against each Lot.

Suppliers will be ranked based on their overall score for each Lot, TCE expects to shortlist and invite ideally five to ten of the highest-ranking suppliers per Lot to the ITT stage.

**Table one – Scoring Criteria**

|  |  |
| --- | --- |
| **Scoring 0-5** | **Scoring Criteria** |
| **0** | (No response) Failure to submit an answer or confirmation. |
| **1** | (Poor response) The question is not directly addressed, and the answer demonstrates minimal understanding of the subject. |
| **2** | (Weak response) The answer only addresses some aspects of the question and/or demonstrates a partial or unfocused understanding of the subject matter. |
| **3** | (Satisfactory response) The answer addresses some aspects of the question and demonstrates sufficient understanding of the subject matter, although there may be some uncertainty or gaps in how it applies to this project. |
| **4** | (Good response) The answer addresses all aspects of the question and demonstrates a clear understanding of the subject matter with good consideration of how it applies to this project. |
| **5** | (Excellent response) The answer addresses all aspects of the question in a high level of detail that demonstrates a clear understanding of the subject matter and a thorough consideration of how it applies to this project. |

The total weighting for the SQ stage is 100%. The SQ questions are weighted, showing the relative importance (expressed as a percentage) and the maximum possible score for each SQ question.

**Table two – Selection Questionnaire Weighting and Maximum Possible Score**

**Lot 1- Public Affairs Engagement Agency**

|  |  |  |
| --- | --- | --- |
| Question | Weighting % | Maximum Score of 5 out of (0-5) |
| Question 1 | 18 | 90 |
| Question 2 | 18 | 90 |
| Question 3 | 18 | 90 |
| Question 4 | 18 | 90 |
| Question 5 | 18 | 90 |
| Question 6 | 10 | 50 |
| Total | 100 | 500 |

**Lot 2: Corporate Communications Agency**

|  |  |  |
| --- | --- | --- |
| Question | Weighting % | Maximum Score of 5 out of (0-5) |
| Question 1 | 20 | 100 |
| Question 2 | 20 | 100 |
| Question 3 | 20 | 100 |
| Question 4 | 20 | 100 |
| Question 5 | 20 | 100 |
| Total | 100 | 500 |

Note: Clarifications maybe undertaken, for the sole purpose of clarifying written SQ responses.

**Here is a worked example of how the scoring will work:**

Tenderer A is awarded a SQ Score of 400 out of maximum possible score of 500.

100 x (Tenderer A’s SQ score/maximum possible score).

Tenderer A’s SQ Score is therefore 80%.

Tenderer B is awarded a SQ Score of 300 out of maximum possible score of 500.

100 x (Tenderer B’s SQ score/maximum possible score).

Tenderer B’s SQ Score is therefore 60%

All scores will be rounded to one decimal place.

1. **Indicative SQ Timeline**

Timeline for SQ process to ITT, this is indictive only. The full procurement timeline will be outlined in the ITT documentation.

| Activity | Dates |
| --- | --- |
| Publication of Supplier Questionnaire/ Find a Tender Notice/ Contracts Finder Notice | 12th August 2024 |
| Clarification Question Deadline | 23rd August 2024 |
| Submission of Supplier Responses to SQ | 11th September 2024 |
| Review and Evaluation of SQ responses to be completed | 18th September 2024 |
| Suppliers to be notified if they will be invited to the ITT | 19th September 2024 |
| Publication of ITT/ Find a Tender Notice/ Contracts Finder Notice | 20th September 2024 |

1. **Portal**

6.1 All SQ/ITT documents will be made available via the Tender Portal.

6.2 Suppliers are instructed not to include in their response anything other than the requested documents. Marketing material will be discarded and will not be read.

6.3 Suppliers are required to submit their completed SQ responses through the Tender Portal. Suppliers are advised to complete their SQ responses in advance of the Submission Deadline to allow time to understand and incorporate the responses to any clarifications that have been requested. It is the responsibility of Suppliers to ensure they are familiar with the system and allow sufficient time for finalising and submitting their SQ responses.

6.4 The Crown Estate is not responsible for inaccurate or incomplete contact information input into the Tender Portal by Suppliers. It is the responsibility of a Supplier to ensure that the contact information they have entered for their organisation on the Tender Portal is accurate and kept up to date. Important notification messages relevant to this procurement may not be received by a Supplier should the contact information be inaccurate. If at any stage a Supplier needs to update the contact information held for their organisation this can be achieved by submitting it via the Tender Portal. The Crown Estate is under no obligation to respond/follow up on ‘out of the office’ responses received from a Supplier and so Suppliers will need to make appropriate arrangements to deal with absences. For any technical advice or assistance relating to the Tender Portal if for any reason the Tender Portal is not available, please contact the Tender Portal helpdesk between 8.00am and 6.00pm Monday to Friday on 0800 069 8620 (or +442036084013 if outside the UK) or email [[help@SourceDogg.com](mailto:help@SourceDogg.com)]. This email address should only be used where there are technical issues with the Tender Portal. Otherwise, all questions and queries relating to this procurement should be submitted via the Tender Portal.

6.5 The Supplier is not permitted to return by email, or by any means other than via the Tender Portal, any part of the SQ/ITT. Any attempt to email, or return otherwise than via the Tender Portal, any part of the SQ/ITT may result in it being excluded.

6.6 All SQ responses must be submitted via the Tender Portal by the Submission Deadline unless alternative submission instructions are stated. Suppliers are advised to allow plenty of time to submit their completed SQ responses onto the Tender Portal as this will take some time to complete and The Crown Estate will not accept any documents, including any completed SQ responses that are submitted after the Deadline.

6.7 All SQ responses must remain valid and open for acceptance by The Crown Estate for a period of ninety (90) calendar days from the Submission Deadline.

1. **Communications Protocol**
   1. During the SQ period, a Supplier is able to submit clarification questions through the Messages feature within the Tender Portal. This should be used for all queries and requests for clarification regarding the procurement as it provides an effective and auditable trail. A Supplier’s queries will be secure and cannot be seen by any other Suppliers. The Crown Estate will publish the questions and the response, in a suitably anonymous form, via the Messages feature to all Suppliers before the closing date for the submission of SQ responses..
   2. Any questions about this procurement should be submitted in writing via the Tender Portal. The Crown Estate will endeavour to answer all queries about the procurement provided that such queries are received at least six (6) working days before the closing date for receipt of SQ responses. Suppliers must clearly indicate, when submitting a question, which (if any) part of their question they view as confidential and applicable only to the Supplier submitting the question. If The Crown Estate does not agree that the question is confidential and applicable only to the Supplier, the Supplier will be given an opportunity to withdraw the question within two (2) days. If the question is not withdrawn by the Supplier, The Crown Estate may publish the question and response.
   3. Any communication or attempt to contact any member of The Crown Estate's staff and/or officers, may result in your organisation being excluded from the procurement process and not considered further.
   4. All information about this procurement will be made freely available to Suppliers via the Tender Portal. Suppliers should check the Tender Portal regularly for any updated information relating to the procurement.
   5. The Crown Estate may have clarifications that they wish to raise with the individual Suppliers during the tender process. These will be raised by The Crown Estate, in writing, to the individual Suppliers via the Messages feature in the Tender Portal.

**8. Consortia**

8.1 Where a consortium is proposed, all members of the consortium will be required to provide the information required in all sections of the SQ/ITT as part of a single composite response. Responses must enable The Crown Estate to assess the overall provision of Services proposed. The evaluation will take place on the information from the Lead Member.

8.2 Where the Lead Member is a special purpose vehicle or holding company, information should be provided of the extent to which it will call upon the resources and expertise of its members.

8.3 Where a consortium or other grouping of economic operators is proposed each member of the consortium (or grouping) shall provide a written undertaking addressed to The Crown Estate that it, together with the other members, shall make available to the consortium (or grouping) the resources necessary to perform the contract. Where such an undertaking is not received the SQ/ITT shall be considered failed and excluded from further consideration.

8.4 The Crown Estate recognises that arrangements in relation to the consortia may be subject to future change. Suppliers should therefore respond in the light of such arrangements as are currently envisaged. Suppliers are reminded that The Crown Estate must be immediately notified of any changes, or proposed changes, in relation to the bidding model so that a further assessment can be carried out by applying the selection criteria to the new information provided. Any change in consortium membership may lead to subsequent exclusion from the tender process. The Crown Estate also reserves the right to deselect any Supplier prior to any award of contract, based on an assessment of any updated information supplied. Such assessment being carried out in line with the evaluation criteria and methodology identified.

8.6 Where Suppliers are proposing to create a separate legal entity, such as a special purpose vehicle, Suppliers should provide details of the actual or proposed percentage shareholding of the constituent members within the new legal entity.

**9. Sub-contracting**

9.1 Where the Supplier proposes to use one (1) or more sub-contractors to deliver some or all of the contract requirements, they should provide details of the proposed bidding model that includes members of the supply chain and the percentage of work proposed to be delivered by each sub-contractor.

9.2 The Crown Estate recognises that arrangements in relation to sub-contracting may be subject to future change and may not be finalised until a later date. However, Suppliers should be aware that where information provided to The Crown Estate indicates that sub-contractors are to play a significant role in delivery, any changes to those sub-contracting arrangements may affect the ability of the Supplier to proceed with the procurement process or to provide the supplies and/or Services required. Suppliers should therefore notify The Crown Estate immediately of any change in the proposed sub-contractor arrangements. The Crown Estate reserves the right to deselect any Supplier prior to any award of contract, based on an assessment of the updated information. Such assessment to be done in line with the Evaluation Criteria and Methodology as laid out.

**10. Confidentiality**

* 1. Suppliers may only make use of any information provided by The Crown Estate relating to or in connection with this procurement for the purposes of preparing and submitting their SQ response.
  2. Suppliers must treat this SQ (and all the documents forming part of or appended or scheduled to the ITT) and all other information provided by or on behalf of The Crown Estate as private and confidential (and shall procure that their employees, consultants, subcontractors, advisers, insurers and funders shall treat documentation supplied in relation to this SQ as confidential). No Supplier shall disclose that it has been invited to submit An SQ response to The Crown Estate or release details of this SQ (and all the documents forming part of or appended or scheduled to the ITT) other than on a strictly confidential basis and to the extent strictly necessary to such parties as the Supplier needs to consult in order to submit a Tender.
  3. Suppliers shall not at any time release any information concerning the SQ/ITT and/or their Tender and/or any related documents and/or discussion with The Crown Estate in connection to this procurement for publication in the press or on radio, television, screen or any other medium.
  4. This SQ is issued in confidence and remains the property of The Crown Estate. The copyright in this SQ is vested in The Crown Estate and may not be reproduced, copied or stored on any medium without the prior consent of The Crown Estate except in relation to the preparation of the Tender.

1. **Conflicts of interest**
   1. The Crown Estate may exclude any Supplier if there is an actual and/or potential conflict of interest which cannot be effectively remedied. The concept of a conflict of interest as set out in Regulation 24 of the Regulations, includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.
   2. Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform The Crown Estate and provide details of the actual or potential conflict(s) and any measures taken or to be taken to remedy the actual or potential conflict(s).
2. **Freedom of Information** 
   1. Suppliers are to note that The Crown Estate is subject to the Freedom of Information Act 2000 (the FOIA) and the Environmental Information Regulations 2004 (the EIR). Under the FOIA and EIR, members of the public or any interested party may make a request for information held by The Crown Estate at the time of the request.
3. **Final decision and Approval**

13.1 The Crown Estate reserves the right to clarify a Supplier's SQ response at any point during the evaluation process and will do this by communicating with the Supplier concerned via the Tender Portal.

13.2 The Suppliers acknowledge and agree that the requirements set out in the SQ continue to apply throughout the Procurement and, if successful, into the Contract duration. With that in mind, prior to contract award and prior to entering into the Contracts (and at any other reasonable time throughout the Procurement), The Crown Estate reserves the right to request any information from a Supplier to ensure its continued compliance with the SQ criteria, including (but not limited to) evidence of the Supplier's economic and financial standing.