



Homes &
Communities
Agency

Partners Guide to HCA Panels 2014 - 2018

A Guide for Partners Procuring Services through the HCA
Consultant Technical Panels.

Property Panel
Multidisciplinary Panel

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1.0 Introduction

The Homes and Communities Agency's Technical Panels enable the quick and efficient procurement of construction and development related technical services.

HCA makes these Panels available to other public sector bodies as part of its role in supporting the Government's land agenda, which aims to increase economic activity through release of surplus public sector land for development. Technical and Property related services can also be procured by public sector bodies to support their other property, construction and development related activities.

HCA currently operates two Technical Panels. The Property Panel and The Multidisciplinary Panel. Both Panels cover a broad range of services, the Multidisciplinary Panel covers design and technical services including, project management, engineering, planning, architecture and ecology. The Property Panel covers property consultancy, estate management and agency services.

Both Panels have been procured through fully OJEU compliant processes, and offer a quick and efficient means to procure high quality, good value development related technical services through a simple mini competition process. Use of the panels offers significant time and resource savings over stand-alone OJEU complaint processes and procurement risk is also reduced.

Panel members are sound and established firms and all have a good and demonstrated track record of delivering services to public sector clients, many of the panel members are supported by a range of sub-consultants, who have specialist or local knowledge, some sub-consultants are smaller companies.

The HCA makes the panels available to a wide range of public bodies and in recent years over 200 public bodies have signed up to use them.

2.0 Benefits of using the Panels

The key benefits to public sector bodies of using the panels are:

- Saves time and money in the procurement of the services in that there is no requirement to go through a full OJEU compliant procurement process.
- Services can be procured through a simple mini competition process.
- The panels provide a sound and legally compliant route to procure services.
- Panel members are pre-qualified companies who have been selected for their capability, track record and capacity to deliver the services to public sector clients.
- Individual procurements of services can focus entirely on the requirements of the project. There is no need to undertake prequalification activities such as checking track record, financial standings, insurances or health and safety.
- Public bodies can access the frameworks by signing up to a simple access agreement, with the HCA, following this, the HCA will provide full information on the panels and how they can be used.
- All panel members have provided a set of competitively tendered panel rates; these are the highest rates that can be used by panel members on work procured through the framework.
- The scope of services is broad and inclusive and covers the full range of services required to support public sector bodies in their property and development related activities.
- The HCA panel team can provide help and support and answer queries on using the panel, if this is required.
- The panels are open to a wide range of public sector bodies free of charge, the full list of those able to use the panels is contained in appendix A.

3.0 Schedules of Services

The schedules of services cover the range of services that can be procured through each of the panels. Panel members have been assessed on their capacity and capability to deliver these services. Key areas covered by the schedule of services for each of the panels are below.

Property Panel (2014-18) OJEU Reference No. 2013/S 235-408288

- Property Consultancy Services
- Property Agency Services
- Estate Management Services
- Property Investment and Financial services
- Valuation Services
- Lead Consultant and Project Management Services
- General Services

Multidisciplinary Panel (2014-18) OJEU Reference No. 2014/S 020-031462

- Project Management and Cost Management
- Engineering
- Architecture
- Planning
- Masterplanning
- Landscape architecture
- Ecology and Biodiversity
- Construction Design and Management (CDM) Co-ordinator
- Property Consultancy

A full schedule of services is available.

4.0 Key features of the Panels

- The Panels operate for **4 years**.
- Each of the panels can be used to procure up to **£100m** of services over the **4 year term**.
- **Long term projects** can be procured through the framework that may go past the 4 year term of the contract. Services procured through the framework may extend for 5 years after the expiry of the framework. The services must be procured before the expiry of the contract.
- The panels are national panels and cover the whole of England.
- All panel members have demonstrated that they have **insurance** cover of £10m for (Professional indemnity, Public liability & Employers liability Insurance).
- The contract provides for **collateral warranties**, where works can be assigned in favour of developers, funders, purchasers, tenants and/or other third parties acquiring interest in the services carried out.
- **Tendered rates** are provided by each panel member, these are the highest that can be charged on work procured through the panel. Tendered rates in general consist of daily rates for a range of grades of staff; % fees are also available for a range of property related activities. Tendered rates will be reviewed by HCA annually on the anniversary of the formation of the Panels. Any adjustments will be made at the absolute discretion of the HCA, but any adjustments will generally be in line with the Retail Price Index (RPI).
- A simple **mini competition** or draw down process is defined; this can be tailored to meet the needs of individual projects.
- Many panel members are supported by **sub-consultant teams**; Panel members act as a single point of contact and are responsible for management and coordination of their sub-consultant teams.
- Sub-consultant teams can be established to suit the needs of specific pieces of work.
- Each Panel member has appointed a **lead and deputy contact**, these are responsible for managing the work procured through the framework and should be the first point of contact with the company.
- A **framework agreement** has already been negotiated with panel members; this also covers work procured by other public bodies.
- Public bodies can also enter into a separate form of **draw down contract** with panel members where this is appropriate.

5.0 How Public Sector Bodies can access the panels

Public sector bodies, wishing to procure through the HCA's Technical Panels will firstly need to sign up to an Access Agreement with the HCA. Once the HCA has received the signed Access Agreement, the public sector body will be given log in details to a secure website that contains full information enabling them to use the Panels.

Further information on the frameworks can be obtained from <https://www.gov.uk/government/organisations/homes-and-communities-agency>

If you wish to sign up to use the frameworks please contact claire.barclay@hca.gsi.gov.uk

This handbook provides brief guidance on how to procure through the HCA panels.

Further advice can be obtained by contacting:

claire.barclay@hca.gsi.gov.uk
deborah.vogwell@hca.gsi.gov.uk
clare.moore@hca.gsi.gov.uk

The HCA will have no liability for works procured by other Public Bodies.

6.0 Panel Details

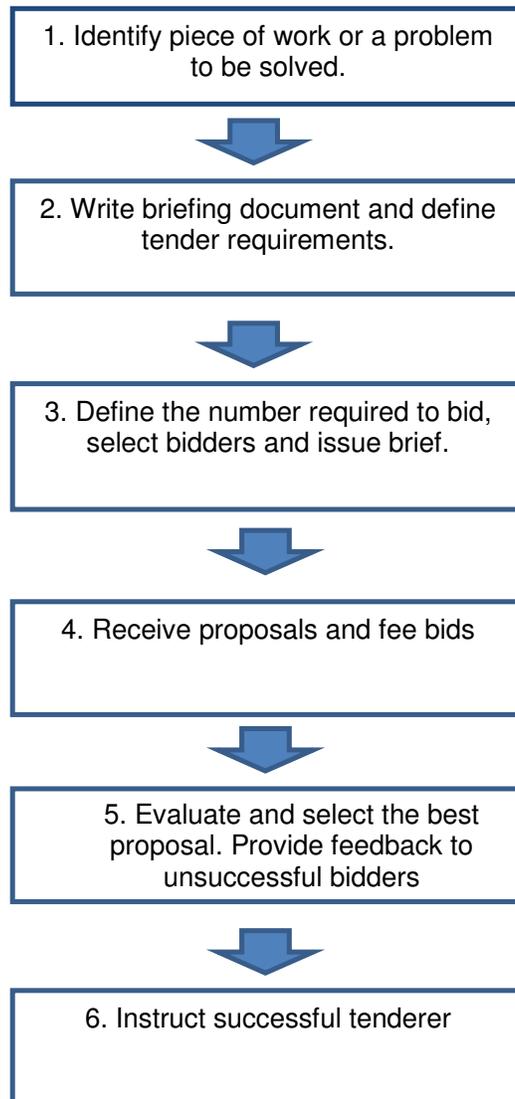
Membership of the panels and a summary of the services available is as follows:-

Property Panel 18th June 2014 - 17 June 2018	
Panel Members	Summary of Core Services
<ul style="list-style-type: none"> • Bilfinger GVA • BNP Paribas Real Estate Advisory & Property Management UK Limited • Capita Property & Infrastructure • Carter Jonas LLP • CBRE Limited • Cushman & Wakefield • Deloitte LLP • GL Hearn • Jones Lang LaSalle Ltd • Lambert Smith Hampton Group Limited • Montagu Evans LLP • Savills (UK) Limited • Thomas Lister Limited and AECOM Limited • Valuation Office Agency/DVS 	<ul style="list-style-type: none"> • Property Consultancy Services • Property Agency Services • Estate Management Services • Property Investment and Financial services • Valuation Services • Lead Consultant and Project Management Services • General Services
Multidisciplinary Services 2nd November 2014 -3 November 2018	
Panel Members	Summary of Core Services
<ul style="list-style-type: none"> • AECOM LTD • Amec Foster Wheeler Environment & Infrastructure UK Limited • Arcadis Consulting (UK) Limited • Atkins Limited • Building Design Partnership Limited (BDP) • CH2M Hill United Kingdom (CHUK), • Mott MacDonald Limited • Mouchel Limited • NPS Property Consultants Ltd • Ove Arup & Partners International Ltd • Pell Frischmann Consultants Ltd • Peter Brett Associates LLP • Savills (UK) Ltd • Tibbalds CampbellReith Joint Venture • WSP UK Ltd • WYG Engineering Limited 	<ul style="list-style-type: none"> • Project Management and Cost Management • Engineering • Architecture • Planning • Masterplanning • Landscape architecture • Ecology and Biodiversity • Construction Design and Management (CDM) Co-ordinator • Property Consultancy

7.0 Procuring Services through the Panels

Services are procured through the Panels via mini competition. The mini competition should be kept as simple as possible to reduce the time and resource requirements for both public sector bodies and panel members; however the process must be clear, simple and fair. The flow chart below provides details of the key steps required when appointing a Consultant through one of the Panels.

Mini Competition Process



7.1 Mini Competition

In general mini competitions through a Framework Contract should involve all 'available and capable panel members'. However our panels consist of 14, Property Panel, and 16, Multidisciplinary Panel, members, if all were asked to bid this would lead to too high a level of competition as panel members would have only a 1 in 14 or 1 in 17 chance of winning, which would be extremely inefficient.

Two options are available to make the process more efficient;

- Use a two stage process in the form of a sifting brief and tender.
- Adopt a form of escalation of competition whereby fewer panel members are invited to bid for lower value pieces of work.

HCA adopts a form of escalation for services valued below OJEU limit and uses a 2 stage process for works valued above the OJEU limit.

7.2 Issuing the Brief and Implementing the Mini Competition Process

The mini competition system should involve a clear definition of the piece of work required (the brief) and a clear proposal from the Consultants to define how they would undertake the work. The competitive element ensures that the best proposal is selected in terms of quality and cost.

A proforma mini competition document is available together with a simple proforma draw down contract that other public bodies can tailor as they see fit.

Our mini competition process is shared with other public bodies who wish to use the framework but other public bodies are responsible for ensuring that they use a mini competition process that is appropriate for them.

Mini Competition process and thresholds

Estimated value of commission	Number of Panel Members who should be asked to bid	Bid information required
Below £10,000	In response to a brief, one Panel Member from the relevant Panel will be invited to submit a proposal to include:	<ul style="list-style-type: none"> • Brief statement on how commission would be undertaken • Staff Proposed • Timescale • Provision of a lump sum fixed fee/or fee proposal based on Tendered fee rates (depending on the particular circumstances)
Between £10,000) and OJEU Services threshold (currently £172,514)	3 Panel Members selected from the Panel will be invited to respond to a brief with a proposal to include information such as:	<ul style="list-style-type: none"> • Proposal to describe how commission would be undertaken • Staff proposed, together with a resource schedule • Programme • Provision of a lump sum fixed fee and resource plan based on Tendered fee rates
Above OJEU Services threshold (currently £172,514)	Sifting Brief exercise to achieve a max of 5 Panel Members to be invited to respond to a brief with a proposal to include information such as:	<ul style="list-style-type: none"> • Proposal to describe how the commission would be undertaken, an outline of the approach, an assessment of the commission being offered • Staff proposed, together with a resource schedule • Short CV summaries • Proposals for management of the commission • Programme • Provision of a lump sum fixed fee and resource plan based on Tendered fee rates • It is likely that an interview will form part of the selection process for a commission of this size

7.3 Sifting Brief

For commissions where the estimate is likely to exceed the OJEU limit the opportunity should be offered to the whole Panel, a sifting brief exercise should be undertaken when there is a high level of interest from Panel Members. The purpose of this is to determine a Tender list of about 4 or 5 Panel Members who are best suited to bid.

You should ensure that the questions you ask are specific to the success of your project and are sufficient to enable a fair evaluation to be made. The proforma Sifting Brief can be found via the secure website.

7.4 Evaluation Criteria

The evaluation criteria to be used to assess mini competition bids should be project specific and must be made clear in the brief. Panel Members have already undergone a rigorous quality assessment in order to secure a place on the Panel; all have demonstrated that they are capable of delivering all of the services covered by the panel to a high standard. As such mini competitions can in general place a greater emphasis on price.

The Evaluation Criteria for commissions over £10,000 in value are as follows:-

Quality

0 – 50% of the marks will be awarded for quality and the evaluation criteria will be:

- Technical merit of the proposal
- Understanding of the project requirements
- Staff and other resource
- Management and communications
- Programme

Price

50% -100% of the marks will be awarded for Price.

Evaluation criteria can be tailored to suit individual commissions by using sub-criteria to define specific requirements under each heading. The quality weighting can be split across the quality award criteria to reflect the need of the project.

The Award criteria for each commission should be confirmed within the mini tender.

7.5 Feedback to Unsuccessful Tenderers

Every Tenderer that enters a public procurement exercise has the right to a statutory debrief or feedback. The feedback process is a vital part of the tendering process for both the tenderer and the procuring body.

If the tendered value of your mini competition is over the OJEU threshold you must allow for a 10 day standstill period following evaluation and selection.

8.0 Instructions Procedures

Partners can follow their own procedures regarding instructing consultants, subject to the proviso given in Clause 1.2 of Schedule 6 of the framework contract. This sets out the form of instruction for Public bodies procuring services through the framework. A simple draft form of draw down contract is also available.

APPENDIX A: Potential Users of the Framework

Please note that this will also include any successor organisations of those listed below

Organisation

Central Government Departments, their agencies and non-departmental Public Bodies
Defence Infrastructure Organisation

Oil & Pipeline Agency

Department for Environment, Food and Rural Affairs

Environment Agency

Natural England

Department for Transport

Highways Agency

London & Continental Railways Ltd

British Rail Board (Residuary)

Network Rail

DVLA

VOSA

Highspeed 2

Home Office

Department for Culture Media and Sport

Judicial System (Ministry of Justice)

DEFRA

DCLG

The Crown Estate

Department of Education

Olympic Delivery Authority

Department of Energy and Climate Change (including Coal Authority)

Nuclear Decommissioning Authority

NDA Properties Ltd

Business Innovation and Skills

Land Registry

Local Authorities

A Minister of the Crown

Royal Mail

English Heritage

Community Land Trusts

Olympic Park Legacy Company

GLA Group

Web link

<http://www.direct.gov.uk/en/DI1/Directories/A-ZOfCentralGovernment/index.htm>

<http://www.mod.uk/defenceinternet/microsite/dio/>
No web site - go through Defence Infrastructure Organisation

<http://www.defra.gov.uk/>

<http://www.environment-agency.gov.uk/>

<http://www.naturalengland.org.uk/>

<http://www.dft.gov.uk/>

<http://www.highways.gov.uk/>

<http://www.lcrhq.co.uk/>

<http://www.brbr.co.uk/>

<http://www.networkrail.co.uk/>

<http://www.dft.gov.uk/dvla/>

<http://www.dft.gov.uk/vosa/>

<http://www.hs2.org.uk/abouths2ltd>

<http://www.homeoffice.gov.uk/>

<http://www.culture.gov.uk/>

<http://www.justice.gov.uk/>

<http://www.defra.gov.uk/>

<http://www.communities.gov.uk/corporate/>

<http://www.thecrownestate.co.uk/>

<http://www.education.gov.uk/>

<http://www.london2012.com/about-us/the-people-delivering-the-games/the-olympic-delivery-authority/>

<http://www.decc.gov.uk/>

<http://www.nda.gov.uk/>

<http://www.bis.gov.uk/>

<http://www.landregistry.gov.uk/>

http://www.direct.gov.uk/en/DI1/Directories/LocalCouncils/AToZOfLocalCouncils/DG_A-Z_LG

<http://www.parliament.uk/mps-lords-and-offices/government-and-opposition1/her-majestys-government/>

<http://www.royalmail.com/>

<http://www.english-heritage.org.uk/>

<http://www.dft.gov.uk/>

<http://www.legacycompany.co.uk/>

<http://www.london.gov.uk/who-runs-london/greater-london-authority/gla-functional-bodies>

<http://www.dh.gov.uk/en/Aboutus/OrganisationsthatworkwithDH/Armslengthbodies/index.htm>

Department for Health Arms Length Bodies

Department for Health Arms Length Bodies	http://www.dh.gov.uk/en/Aboutus/OrganisationsthatworkwithDH/Armslengthbodies/index.htm
NHS PROPERTY Services Ltd	
Special Health Authorities	http://www.nhs.uk/ServiceDirectories/Pages/SpecialHealthAuthorityListing.aspx http://www.nhs.uk/ServiceDirectories/Pages/StrategicHealthAuthorityListing.aspx
Strategic Health Authorities	
Primary Care Trusts	http://www.nhs.uk/ServiceDirectories/Pages/PrimaryCareTrustListing.aspx
Mental Health Trusts	http://www.nhs.uk/ServiceDirectories/Pages/MentalHealthTrustListing.aspx
Care Trusts	http://www.nhs.uk/ServiceDirectories/Pages/AmbulanceTrustListing.aspx http://www.monitor-nhsft.gov.uk/home/about-nhs-foundation-trusts/nhs-foundation-trust-directory
NHS Foundations Trusts	
Ambulance	http://www.nhs.uk/ServiceDirectories/Pages/AmbulanceTrustListing.aspx
Extracare Providers	http://www.housingcare.org/elderly-uk-assisted-living-extra-care-housing.aspx
NHS Hospital Trusts	http://www.nhs.uk/servicedirectories/Pages/ServiceSearch.aspx
Community Health Councils	http://www.nhs.uk/servicedirectories/Pages/ServiceSearch.aspx
Local Health Boards	http://www.nhs.uk/servicedirectories/Pages/ServiceSearch.aspx
General Practitioners	http://www.gmc-uk.org/doctors/register/LRMP.asp
Acute Trust (NHS)	http://www.nhs.uk/ServiceDirectories/Pages/AcuteTrustListing.aspx
ALMOS	http://www.almos.org.uk/member_list
Fire Authority	http://www.fireservice.co.uk/information/ukfrs
Education Establishments	http://www.education.gov.uk/edubase/search
BBC	http://www.bbc.co.uk/ http://www.online.police.uk/forces.htm http://www.apa.police.uk/your-police-authority/contact-information
Police Authorities	http://www.apa.police.uk/transition-to-pccs
Ministry of Defence	http://www.mod.uk/DefenceInternet/Home/
Registered Providers / Housing Associations	http://www.tenantservicesauthority.org/server/show/nav.14538
Almshouses	http://www.almshouses.org/
A local asset backed vehicle or asset investment vehicle between a body listed and a private sector partner	
Local Development Agencies	
LEPS	http://www.communities.gov.uk/localgovernment/local/localenterprisepartnerships/summaries/
National Parks	http://www.nationalparks.gov.uk/
The City of London Corporation	http://www.cityoflondon.gov.uk/
Transport for London	http://www.tfl.gov.uk
Greater London authority	http://london.gov.uk/