



# OGC Buying Solutions

## Technical Assurance Framework Overview

November 2009

**CAPITA SYMONDS**  
successful people, projects and performance



## CAPITA SYMONDS

# Quick Procurement

The Buying Solutions frameworks are pre-competited and have pre-defined services and prices -this enables immediate, fully auditable appointments that demonstrates best value

- Can be used by any public sector organisation
- Fully compliant alternative to OJEU process
- Pre-competited: competitive rates and best value
- Average 2-4 wks to procure supplier (typically 9 mths + for OJEU)
- Average savings of > £100k compared to OJEU
- Direct commissions or mini-competitions
- No charge for clients to use the framework



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### Quick Procurement

Additional benefits from using  
the Buying Solutions frameworks

- Suppliers have been subject to rigorous pre-competition
- Competitive, pre-competed rates
- Clear pricing: day rates, discounts for volume and fixed fee options
- Pre-agreed 'Terms and Conditions' provide solid contractual safe guards
- Demonstrates value for money and 'Gershon' type savings
- No limit to the value of projects that can be procured
- On-line tender, order and e-Commerce facilities
- Buying Solutions team available to support clients



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## Quick Procurement

### The Scope of Technical Assurance services

- Business Case Development
- Procurement
- Contract and OJEU Advice
- Management Support
- Project and Programme Reviews
- Performance Measurement and Benchmarking
- Post Project Evaluations
- Project Monitoring
- Independent Client Adviser Role
- Audits
- Technical Building Inspections
- Setting up and administering Measured Term Contracts
- General Independent Advice (includes RIBA Stage A-C)

Relevant property, construction, maintenance and facilities management activities:

- Property Management and Maintenance services (e.g. contract set up, quality management, management information, technical delivery services, and facilities management)
- Project Management of individual works contracts or programmes (incl. project management processes, design development, tender action, construction, completion and handover)



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Capita Symonds fees are clear and competitive

- Pre-competed, competitive day rates
- Includes options for 'fixed fee'
- Capita Symonds pays 1% to Buying Solutions from the final fee
- Discounts for continuous work
- Discounts for location (outside South East)



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## Quick Procurement

### Key features of the process

- Buying Solutions advise that clients **can order directly from a single supplier**, without any competition, where it is clear from the information available via the framework that the supplier can provide best value for money\*
- Otherwise, clients should invite all “**capable suppliers**” to express an interest in any potential commission
- The list of “**capable suppliers**” can be refined through an initial capability assessment process
- If there is more than one “**capable supplier**” then a mini-tender competition can be conducted to select the best value for money option

\*More information about whether a Mini-competition is required can be provided by our Framework Management Team



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## Quick Procurement

### The process step-by-step

1. **Decide if a direct appointment can be made:** If one supplier can be identified as providing best value for money then a proposal can be requested from and an order can be placed with that supplier directly without further competition
2. **Expression of Interest (“EOI”):** Clients invite all suppliers to provide a simple ‘yes/no’ statement about whether they are ‘interested’ and ‘capable’ against an outline brief
  - a) The EOI statement is usually requested within 48hrs



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The process step-by-step

3. **Capability Assessment to short-list (optional):** As part of the EOI, clients can choose also to do an initial capability assessment to refine/shorten the list of suppliers to Invite to Quote to only those that meet a particular capability standard for the project
  - a) The form, evaluation criteria and timescale for any initial capability assessment are at the discretion of the client, as appropriate to the nature and complexity of the project. It might include a request for information about suppliers' resources as well as experience and track record relevant to the project



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### The process step-by-step

#### 4. **Invitation to Quote (“ITQ”)** – the client should provide instructions to the supplier(s) being invited about how they wish to receive their Quotations

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- a) Mini competition (if required\*) - If, after the initial EOI / capability assessment, there is more than one “Capable” supplier then as part of the ITQ process, clients can run a mini-competition to select the best supplier for the project. In which case, the ITQ submissions should include sufficient information for the client to be able to assess which supplier is the best for the project
- b) The format of the Quotation can be very informal (e.g. a letter with fees) or more structured (e.g. a proposal asking for method statements, resources, CVs as well as fees); this is at the discretion of the client, as appropriate to the nature and complexity of the project and whether there will be a mini-competition between more than one supplier.



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### The process step-by-step

- c) Pricing – Quotations are priced on a day rate basis . Capita offers discounts and lump sum and fixed fee options for certain types of projects – more information on these options can be provided by the Capita Symonds Framework Management Team
  - d) The Quotations can be submitted via the Buying Solutions web-site or directly to a client contact (hard copy and/or email)
  - e) Suppliers are usually requested to submit their Quotations within 1 to 4 weeks, depending on the format and level of information required
5. **Appointment** – the client should notify all suppliers that participated in the ITQ of the result and provide some feedback on their relative performance



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### The process step-by-step

6. **Contracting** – the standard contract for the Framework Agreement (as amended by the client with their chosen supplier) should be used for the commission
  - a) Each Buying Solutions Framework Agreement includes a schedule with a standard form of contract
7. **Orders and invoices** – clients are free to place orders and pay invoices directly with their chosen suppliers using their standard processes
8. **Buying Solutions Reporting and Management Fees** – it is the responsibility of the supplier to notify Buying Solutions of new commissions so they can invoice that supplier 1% mgmt fees



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## FAQ's

### **Does the EU Public Procurement Directive have any implications for the framework?**

- The frameworks are fully compliant with the EU PPD

### **How do we comply with our own Standing Orders requirement to get 3 competitive quotations?**

- The suppliers have already been subject to a rigorous OJEU competition
- Therefore, the requirement for at least 3 competitive quotes should already have been satisfied

### **Do we need to use the framework if the value of the commission will not exceed the lower threshold of OJEU?**

- The frameworks can be used for any value of commission and provide clarity and contractual rigour in terms of the scope, quality and pricing of projects.
- It would also allow the scope of services to be increased after appointment without involving the OJEU aggregation rules

### **Is it too late to use the framework if we have already started the OJEU process?**

- The OJEU process can be stopped at any time prior to the issue of the Contract Award Notice and the Buying Solutions frameworks used in lieu, saving both time and money, whilst complying with EU legislation.



# CAPITA SYMONDS

## Management Team

***If you need any further information about the details of the framework, Capita Symonds has a dedicated Framework Management Team to provide support***

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