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| Process 3 – Activity Notes | |
| **1.** | **Identify Secondment Need** |
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|  | A *Client* within a MHA+ member Authority identifies the need for a secondment using the MHA+ PSP 4 contract. |
|  | The scope of services covered under the contract is listed in Annex A of the PSP 4 Framework Information. |
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| **2.** | **Inform your MHA+ Lead Representative** |
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|  | The *Client* notifies their authority MHA+ lead representative of their intentions and proceeds as advised. |
|  | If there is a query regarding the proposed work being included in the scope of services this should be raised with the MHA+ Framework Manager, via the Authority lead representative |
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| **3.** | **Hold Point: Choose Lot 2 Selection Procedure** |
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|  | Selection options are as defined in Framework Information Annex B: Selection Procedure |
|  | ***Client* Selection Procedure Supporting Documents are available on the ISP** |
|  | * **Direct award** – based on the overall ranking of *Suppliers* on the basis of their overall tender score (quality and price combined); * **Direct award** based on the Client’s own price/quality weightings as applied to the framework tender scores * **Direct award** based on the unit Price for a specific job role; * **Direct award** based on any of selection options 1-3, and incorporating consideration of the ongoing performance of the *Supplier*. * **Mini Competition** |
|  | It is for the *Client* to decide the procedure used, selecting the option that they determine will provide the most economically advantageous tender (MEAT) for their requirements |
|  | For Direct Award: go to Activity 4. |
|  | For Mini Competition: go to Activity 4a |
|  | **Accountable Person:** MHA+ member authority lead representative or other officer authorised to sign project briefs.  **Release Mechanism:** Internal Local Authority procurement decision. |
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| **4.** | **Direct Award – view client choice award forms** |
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|  | Having chosen the Direct Award route, using the Selection Procedure supporting documents, the *Client* will contact the *Supplier* Secondment Manager (SM) to discuss their general requirements including the scope of the works and an indication of the anticipated duration and budget.to enable the SM to identify the most suitable resource. |
|  | This will enable the SM to identify the most suitable resource. See Framework Information: Annex B 3.1 - 3.12; Framework Information: Annex C Quotation Procedure |
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| **4a.** | **Mini Competition** |
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|  | Having chosen the Mini Competition route, the *Client* shall follow the requirements of Framework Information Annex C: Quotation Information, and their internal procurement process for tendering works. |
|  | As this mini competition is still under the MHA+ PSP 4 Framework only the two Lot 2 *Suppliers* can be invited to tender. |
|  | The *Client* shall fill in and issue the Request for Lot 2 Mini Competition and the Contract Data PSSC Template or Contract Data PSSC Part 1 Template (as applicable) from this process manual, along with other referenced documents issued to provide a clear brief and scope of works. A Mini Competition Checklist is linked to this process for guidance. |
|  | The *Client* shall issue the Contract Data PSSC Template or Contract Data PSSC Part 2 Template (as applicable) from this process manual to be filled in by the tendering *Suppliers*. |
|  | The *Client* shall submit the Contract Data PSSC Template for signing to make the order contractual, or in the case of PSC an Authority Approved Form of Agreement. |
|  | Professional Services Short Contract (PSSC) normally for values up to £250k and paid as Lump Sum (usually against a schedule of activities) or Time Charge. See Framework Information: Annex D Contract Flow Chart |
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| **5.** | **Supply Job Description and Scope of Works** |
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|  | The *Client* provides the SM with a job description, scope of works and the anticipated duration of the secondment in hours. |
|  | The *Supplier* SM will work with the *Client* to fully understand their requirements, needs and expectations and help, as required, to develop the detailed scope of works to be delivered. |
|  | Where the supplier is unable to deliver the *Client* secondment request, then the SM shall inform the *Suppliers* Regional Director (RD) so that the work can be offered to the other Lot 2 supplier in accordance with Clauses 3.3 – 3.5 in the PSP 4 Framework Information. |
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| **6.** | **Submit CVs with proposed Band and Rate. Assess IR35** |
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|  | The *Supplier* SM will submit suitable CVs to the *Client*, together with the proposed Band and associated rate. |
|  | The *Supplier* prepares their assessment of the total of the Prices for the Order in accordance with the requirements of the Client, using one of the following payment options: Framework Information – Annex C: Quotation Procedure point 2.10 |
|  | The service is to be carried out on a time charge basis and the Supplier MHA+ PSP4 Consultancy Rates for its own people and people provided by a subcontractor apply. |
|  | The service is to be carried out on a priced basis. |
|  | The *Supplier* is paid an amount for the item, which is not adjusted if the quantity of work in the item changes. The *Supplier* enters the amount for each item in the Price column and enters the total of the amounts as the total of the Prices. |
|  | The service is to be carried out on a re-measure basis. |
|  | The *Supplier* is paid according to the rate stated in the quotation for an item multiplied by the quantity completed. The Supplier inserts the rate for each item in the quotation. The entries for the item number and description, unit and expected quantity are entered by the *Client / Supplier*. |
|  | The SM will provide a quotation based on the number of hours specified by the *Client* for the people specified and people rates submitted in the quotation information. The quotation will be prepared in accordance with the PSP 4 Contract and the *Suppliers* rates submitted at PSP 4 tender stage. |
|  | The SM shall contact the suppliers RD for rates andany **indexation rises** that may need to be allowed for. Only the PSSC rates are subject to the *Framework* indexation. |
|  | The SM will provide with the quotation a CV for each individual proposed to demonstrate their capability and the appropriateness of the *people rate* being supplied. |
|  | All staff proposed to work on PSSC Time Charge orders must have an MHA+ approved Staff Band, relative to their Specialism. The SM will follow the link to Process 2, the Staff Charge Band Approval Process, to ensure this is in place. Where new Staff Band Checklists are required the SM shall contact the RD who will work with them to get approval using Process 2. |
|  | The suppliers SM together with the *Client* will assess whether the role falls in or out of scope for IR35. |
|  | The SM will note that preparing a project brief and estimate does not indicate any commitment for the client to place a Package Order. |
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| **7.** | **Hold Point: Agree Cost and Programme** |
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|  | On receipt of the documents submitted from Activity 6, the *Client* will notify the SM of their intentions as shown on the process flow within the timescales agreed with the SM. |
|  | Where the quotation is to be revised the *Client* will notify the SM with reasons for rejection enabling the SM to submit a revised quotation within stipulated timescales. |
|  | The *Client* will ensure that adequate funding is still in place - prior to placing an order. |
|  | **Accountable Person:** Authority MHA+ lead representative or other officer authorised to sign project briefs.  **Release Mechanism:** Sign and return the *Contract Data PSSC Template* or *Authority Form of Contract* for PSC to the PM and place a Purchase Order in accordance with the Authorities process, to enable the *Supplier* to submit invoices. |
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| **8.** | **Sign Contract for Order** |
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|  | The SM will not carry out any work until a signed contract has been received. |
|  | In exceptional circumstance it may be decided to proceed at risk in order to help MHA+ *Clients*. This will be subject to the SM being given approval via the suppliers Governance and Risk Management Processes which cannot be assumed to be a given and will require robust assurances from the client. |
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| **8a.** | **Notify Cancellation of Process** |
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|  | If the proposal is to be cancelled the *Client* will notify the PM and provide reasons for information and learning purposes |
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| **9.** | **Secondment Start** |
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|  | The *Client* and SM agree a start date for the secondment. |
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| **10.** | **Submit completed work and complete 360° Project Feedback Questionnaire** |
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|  | The SM will ensure that the 360° Feedback Questionnaire is completed by both the *Client* and the *Supplier* and returned to the SM within 20 working days of completion. |
|  | The SM will collate and submit to the MHA+ Framework Manager for review at the Framework Community Board. |

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