

Process 3 – Activity Notes

Process Owner	Suppliers Implementation Owner	MHA Implementation Owner
Framework Community Board	Suppliers Framework Manager	MHA Framework Manager
Objective: To ensure the fast, efficient and effective commissioning of Lot 2 Professional Services through PSP3		

1 Identify Secondment Need

- A Client within a MHA member Authority identifies the need for a secondment using the MHA PSP3 contract.
- The scope of services covered under the contract is listed in Annex A of the PSP3 *Framework Information*.

2 Inform your MHA Lead Representative

- The Client notifies their Authorities 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 Authorities lead representative.

3 Hold Point: Choose Lot 2 Selection Procedure

- Selection options are as defined in *Framework Information - 7.3 Lot 2 Selection Procedure*.
 - **Direct Call Off** – Waterman as the Most Economically Advantageous Tender (MEAT) over the whole MHA region in the PSP3 tender process.
 - **Mini Competition** – Between the two Lot 2 Suppliers. See *Framework Information 7.3.3 to 7.3.6*.

See *Framework Information* for full details and contact the MHA Framework Manager for advice if required.

- For either Direct Call Off go to Activity 4. For Mini Competition go to Activity 4a.

Accountable Person: Authorities MHA lead representative or other officer authorised to sign project briefs.

Release Mechanism: Internal Local Authority procurement decision.

4 Direct Call Off - Contact Waterman Secondment Manager

- Having chosen the Direct Call off route, the Client will contact their Waterman 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.

4a Mini Competition

- Having chosen the Mini Competition route, the Client shall follow the requirements of *Framework Information 7.3.3 to 7.3.6 and 8 Quotation Information*, and their internal procurement process for tendering works.
- As this mini competition is still under the MHA PSP3 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.
- 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.

5 Supply Job Description and Scope of Works

- The Client provides the SM with a job description, scope of works and the anticipated duration of the secondment in hours.
- The supplier's 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 Clients 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 *Clause 7.2.11 in the Framework Information*.

6 Submit CVs with proposed Band and Rate. Assess IR35

- The supplier's SM will submit suitable CVs to the Client, together with the proposed Band and associated rate.
- 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 PSP3 Contract and the suppliers rates submitted at PSP3 tender stage.
- The SM shall contact the suppliers RD for rates and any **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.

7 Hold Point: Agree Cost and Programme

- 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 definitely still in place prior to placing an order.

Accountable Person: Authorities 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.

8 Sign Contract for Order

- 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.

8a Notify Cancellation of Process

- If the proposal is to be cancelled the Client will notify the SM and provide reasons for information and learning purposes.

9 Secondment Start

- The Client and SM agree a start date for the secondment.