

## **PROVISION OF ESTATES SERVICES CONSULTANCY – TENDER REPORT**

### **Abstract**

This report advises the Committee on the tenders received and a recommendation for acceptance.

### **RECOMMENDATION**

The Committee is recommended to approve the appointment of Messrs Lickley Proctor, as the Council's sole external estates services consultants for a period of three years commencing 01 March 2005.

### **BACKGROUND**

Applications were invited by means of a press advertisement for inclusion on a Select List of tenderers for the provision of an Estates Services Consultancy. By the closing date of Friday 03 December seven suitably qualified firms had responded:-

- District Valuer Scotland North East, Aberdeen;
- Messrs Donaldsons, Edinburgh;
- Graham+Sibbald, Dundee;
- Messrs GVA Grimley, Edinburgh;
- Messrs D M Hall, Edinburgh;
- Messrs Lickley Proctor, Dundee;
- Messrs Ryden, Dundee.

The firms were asked to provide details on four key criteria:-

- Qualifications and experience of relevant staff;
- Experience of working in the Angus area property market;
- Professional indemnity insurance;
- Experience in similar consultancy work;
- Property management services

Based on an assessment of the information supplied, one firm (Messrs Donaldsons) appeared to be lacking in one of these key criteria (experience of working in the Angus area property market) and was accordingly eliminated from participating further in the process.

### **CURRENT POSITION**

Tender documents were issued to each of the six remaining firms and had to be returned to the Director of Law and Administration by 12 noon on Wednesday 12 January 2005.

Four firms (Graham & Sibbald, D M Hall, Lickley Proctor, Ryden) submitted their tenders timeously and the tenders were then scrutinised and evaluated, firstly on the basis of price. Rather than being on a fixed lump sum basis, the tender document was structured in such a

way as to enable comparisons of individual case prices for 24 possible permutations of tasks and values, and of these Graham & Sibbald was lowest in 5, Lickley Proctor was lowest in 13, and 6 were equal between these two. In virtually every instance D M Hall and Ryden were substantially higher than the other two, sometimes up to 10 times higher.

The permutations were then narrowed down to the six case types which historically have proved to be the most relevant to the Council (Capital Valuations, Acquisition Negotiations, Disposal Negotiations, all over £2,500 in value; Lease Valuations and Negotiations over £1,000; CPO Valuations and Negotiations; Asset Register Valuations). In 5 of these Lickley Proctor offered the better price and one was equal between them and Graham & Sibbald.

Other considerations were then taken into account, such as Management and Supervision, Resources (both those within the companies and those being allocated to the contract), Relevant Experience (Lickley Proctor is the current consultant and Graham & Sibbald its immediate predecessor, and both D M Hall and Ryden produced sufficient evidence of similar work), Human Rights Compliance and Professional Indemnity Insurance. In these matters there was generally no significant difference between the four companies.

D M Hall and Ryden also submitted alternative proposals but none of these were considered to be more advantageous to the Council than those previously outlined.

In summary, therefore, the tender from Messrs Lickley Proctor is the most advantageous in terms of price and there is little to choose between them and any of the other three tenderers in respect of the other matters.

#### **FINANCIAL IMPLICATIONS**

There are no additional financial implications.

#### **HUMAN RIGHTS IMPLICATIONS**

There are no Human Rights Implications specific to this report.

#### **CONSULTATION**

The Chief Executive, the Director of Law & Administration and the Director of Finance have been consulted in the preparation of this report.

#### **CONCLUSION**

Messrs Lickley Proctor have been assessed as providing the Best Value for the provision of an Estates Services Consultancy as a result of the tendering exercise and should be awarded the contract for the provision of an Estates Services Consultancy for the period of three years commencing 01 March 2005.

#### **BACKGROUND PAPERS**

No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information), were relied on to any material extent in preparing the above report.

M G Lunny  
Director of Property Services