



# Legal Services Framework Launch

## Welcome

John Fisher, Chief Executive

[www.chicltd.co.uk](http://www.chicltd.co.uk)

# Agenda

10:00 - 10:15 INTRODUCTIONS AND BACKGROUND | JOHN FISHER

10:15 - 10:25 LOT STRUCTURE AND FRAMEWORK AGREEMENTS | ADE OSUNSANMI

10:25 - 10:40 HOW WILL THE FRAMEWORK OPERATE? | TIM MOREL

10:40 – 11.00 Q&A PANEL DISCUSSION

# WANT TO ASK THE PANEL A QUESTION?

PLEASE USE THE Q&A FUNCTION

## CHIC TEAM

SAM DOMICAN, DIRECTOR OF PROCUREMENT  
ADE OSUNSANMI, HEAD OF PROCUREMENT

## KENNEDY CATER

TIM MOREL, DIRECTOR  
RICHARD SHORT, CLIENT SERVICES MANAGER

# Who's here?

## Framework Partners

- Lot 1 – Corporate, Governance & Finance
- Lot 2 – Housing & Asset Management
- Lot 3 – Development
- Lot 4 - Property

## From CHIC

- CHIC Member Representatives
- CHIC Team Colleagues
- Kennedy Cater Colleagues



# CHIC's Members

Membership is free and available to any public sector organisation or charity.

CHIC is not for profit – costs are reimbursed through transaction fees.





# About CHIC

Helping you deliver efficient and  
compliant procurement



**200+**  
members  
across the UK



**1,000+**  
supply chain  
partners



**40+**  
routes to market  
available



**2m+**  
homes across  
the UK supported



**682**  
Live  
contracts



**250m**  
Annual  
Spend

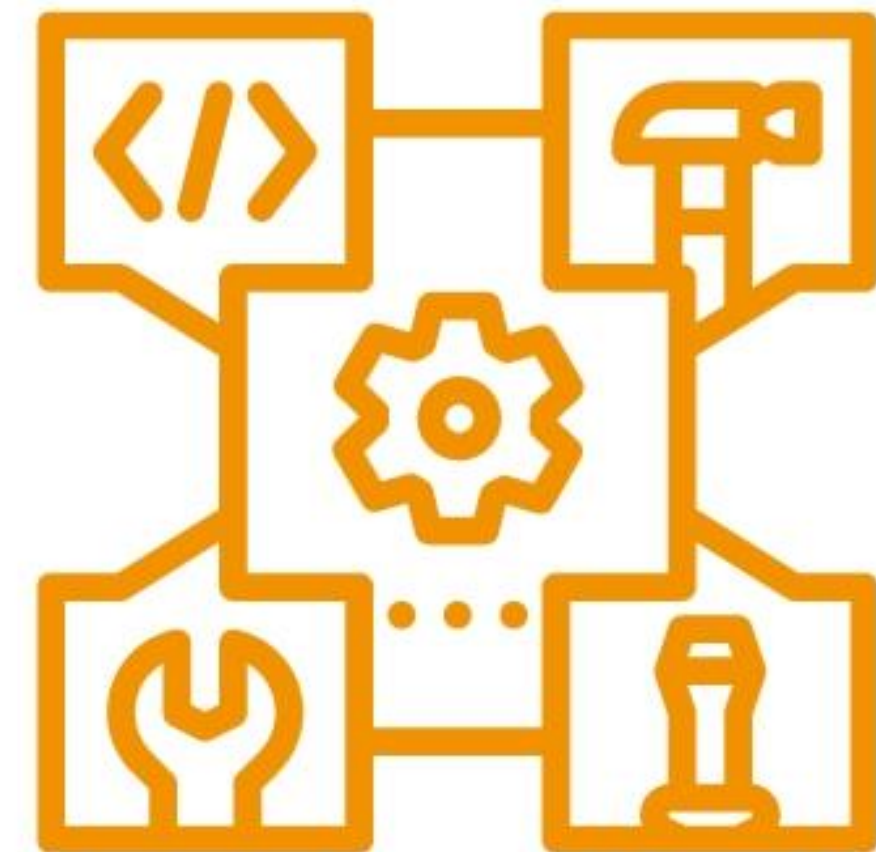
*Helping our members bridge the gap between strategic thinking and operational delivery by  
providing ongoing member support and advice.*

# Frameworks

**CHIC offers a dynamic suite of suppliers, providing members with a marketplace from which to buy and deliver services, fully managed by an in-house supply chain support team.**

CHIC's frameworks are published as “**unranked**”, providing the flexibility you need to work with the suppliers you want.

We provide an ongoing member **managed service** including advice, reporting and benchmarking, with comprehensive **commercial catalogue management** and value for money reporting.



# CHIC's Services



**Materials  
& Merchants >**



**Building Safety  
& Compliance >**



**Newbuild  
Development >**



**Capital & Planned  
Investment >**



**Professional  
Services >**



**Decarbonisation  
& Renewables >**



**Technology  
Solutions >**



**Facilities  
Management >**



# Membership

**We bridge the gap between strategic thinking and operational delivery, providing fully managed procurement, expert account management, dedicated supply chain liaison and commercial support.**



## **Savings**

CHIC has proven that sourcing materials separately from labour secures savings for our members.



## **Value for money**

CHIC's direct materials supply solutions give members the ability to select specific products, at a price that reflects consortium volume purchasing.



## **All areas covered**

Supply can be to an external or an internal contractor, for any maintenance service or for newbuild.

**Members are HA's, LA's and other public sector bodies**

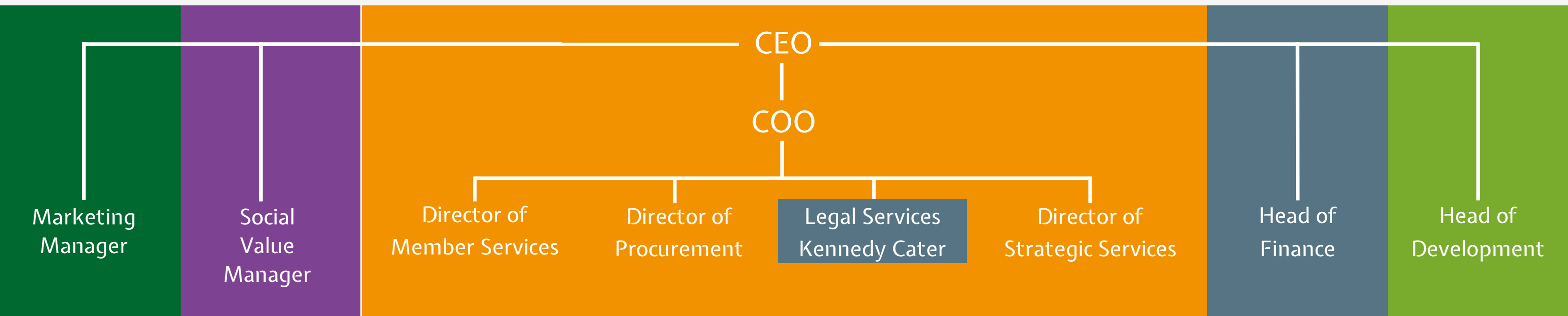
# CHIC's Structure

## Board of Directors

- Independent Chair
- 8+ Member Directors
- Up to 3 Independent Directors



## Senior Management Team



# Social Value Strategy

## CHIC Contracts

**All contracts procured through CHIC must deliver a minimum of 1% social value**

- CHIC monitors and supports contractual outcomes
- Reported annually

## CHIC Direct

**CHIC pledges 10% of all budgeted fee income will be committed to social value outcomes. These will be secured through:**

- Directly delivered support, by CHIC
  - CHIC's Apprentice
  - Social Value Manager
  - Charitable Fundraising
- An annual charitable donation to CHIP (Communities and Housing Investment in People).

# CHIC Legal Services Frameworks

- First procured in 2016
- Second procured in 2020
- Third procured in 2024

All supported by specialist – Kennedy Cater

- Core elements have remained constant but Lots and content have evolved based on experience
- Currently used by 95 Members on a regular basis
- CHIC membership is open to other public sector bodies



# Lot Structure & Framework Agreements

Ade Osunsanmi, Head of Procurement



# Procurement Journey



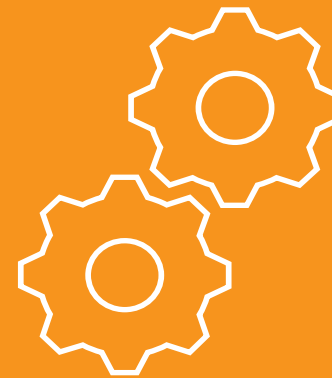
## Stage 1 ( Stakeholders Engagement)

- Member Engagement event - (conversation with customers on Procurement Strategy for the replacement Framework)



## Stage 2 (Procurement Strategy)

- Sourcing Strategy
- Tender documentation preparation



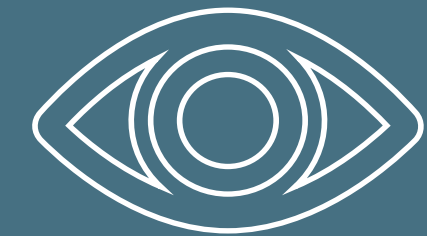
## Stage 3 (Procurement Process)

- Launched ITT on CHIC eSourcing portal
- Responded to various tender clarifications .
- Review and clarification of pricing
- Confirmation of pricing



## Stage 4 (Framework Award)

**Advise suppliers of outcome**  
**Framework preparation**  
**Sign Framework**  
**Supplier onboarding event**  
**Framework Mobilisation**

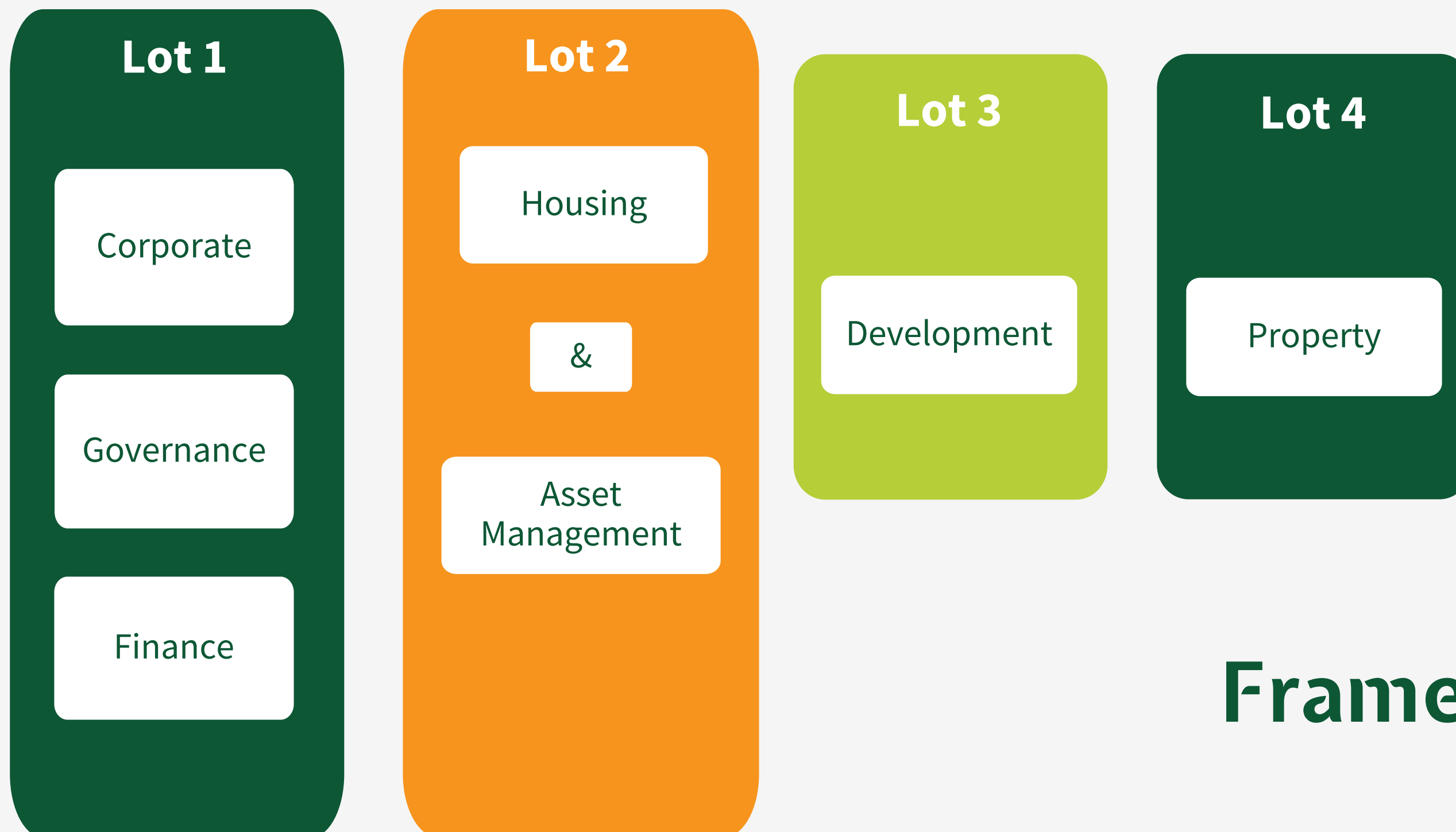


## Stage 5 (Framework Management)

- Manage Framework to deliver outcomes
- Individual call –off contracts under the Framework by Kennedy Cater .
- Performance Management
- Post Project Reviews

# Procurement Timeline - 2024

Activities	Dates
Tender Notice and Documents Published to FTS	January
Tender Return Date	February
Tender Evaluation	March/April
CHIC Board approval	May
Notification of Tender Outcome/ Commencement of Standstill	May
CHIC Framework Launch/ Supplier Onboarding	18 June
Commencement of Framework Agreement	1 <sup>st</sup> July



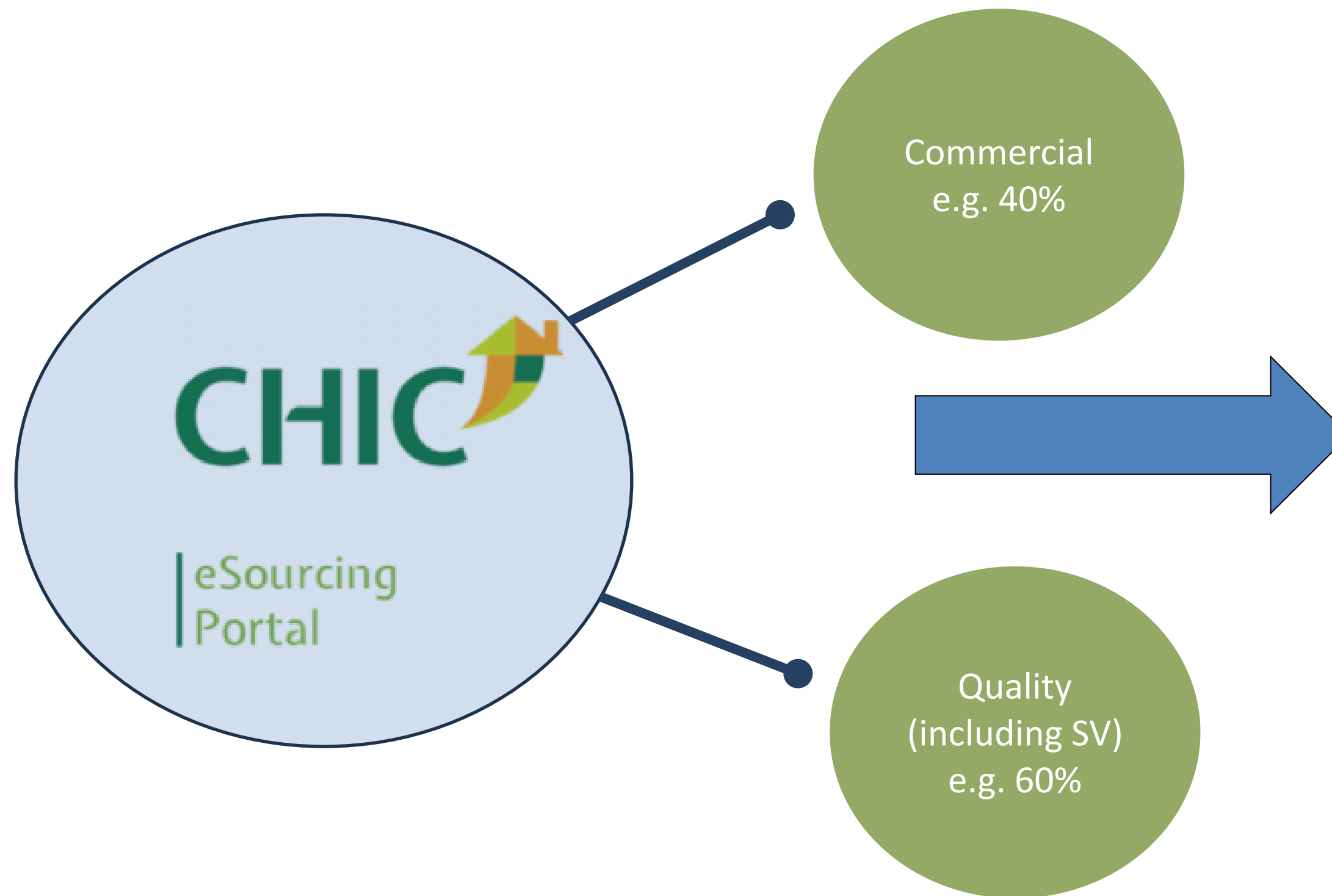
## Framework Lots

# Progression through procurement stages

Lot	Description	No of Tenders received	No of Tenders Rejected	No of awards
1	Corporate, Governance and Finance	15	3	12
2	Housing and Asset Management	20	5	15
3	Development	24	9	15
4	Property	20	5	15

**All Lots were awarded in line with the maximum permitted in the ITT**

# Call-off Mini- Competition



**Call-off Competition looks forward and examines aspects such as:**

- Price **or** Cost
  - will include the best price-quality ratio
- 
- Qualitative assessment may include:
    - ✓ environmental and/or social aspects linked to subject matter;
    - ✓ organisation, qualification and experience of staff assigned to performing contract;
    - ✓ after-sales service, delivery date, delivery process, period of completion



# Framework signing update

Lot	Description	No of fully signed Frameworks	No of Frameworks outstanding
1	Corporate, Governance and Finance	8	4
2	Housing and Asset Management	9	6
3	Development	8	7
4	Property	10	5



# THANK YOU

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# How will the Framework Operate

Tim Morel, Kennedy Cater



# CHIC'S LEGAL SERVICES FRAMEWORK: 2024 - 2028

Tim Morel, Director, Kennedy Cater  
2024

- Covers all members' legal needs and divided into 4 Lots:
  - Lot 1: Corporate, Governance and Finance
  - Lot 2: Housing and Asset Management
  - Lot 3: Development
  - Lot 4: Property
- 24 Law Firms
- > 200 Fixed Fees
- Extensive Value Added & Social Value Benefits



# FRAMEWORK SUPPLIERS

Firm Name	Lot 1: Corporate, Governance and Finance	Lot 2: Housing & Asset Management	Lot 3: Development	Lot 4: Property	Total
Anthony Collins Solicitors LLP	✓	✓	✓	✓	4
Ashfords LLP			✓	✓	2
Bevan Brittan LLP	✓	✓	✓	✓	4
Blake Morgan LLP	✓	✓			2
Brabners LLP		✓			1
Capsticks Solicitors LLP	✓	✓		✓	3
Clarke Willmott LLP	✓	✓	✓	✓	4
Clyde & Co LLP		✓			1
Cobb Warren Ltd		✓			1
Devonshires Solicitors LLP	✓	✓	✓	✓	4
Foot Anstey LLP			✓		1
Forbes Solicitors LLP	✓	✓	✓	✓	4
Freeths LLP			✓		1
Harrison Clark Rickerbys			✓		1
MSB Solicitors Ltd		✓	✓	✓	3
Penningtons Manches Cooper LLP	✓			✓	2
Shakespeare Martineau LLP	✓	✓	✓	✓	4
Sharpe Pritchard LLP	✓			✓	2
Sharratts (London) LLP			✓	✓	2
TLT LLP	✓		✓		2
Tozers LLP		✓	✓	✓	3
Trowers & Hamlins LLP	✓			✓	2
Ward Hadaway LLP		✓	✓	✓	3
Weightmans LLP		✓			1
<b>Total</b>	<b>12</b>	<b>15</b>	<b>15</b>	<b>15</b>	

## HOW MUCH DOES IT COST TO USE?

- No direct cost to CHIC members
- Users only pay the rates set by the suppliers
- The suppliers pay a small percentage of their fees as a management fee to CHIC & Kennedy Cater

- **Fixed Fees from the CHIC fixed fee list** - All panel firms have agreed with CHIC an extensive range of fixed fees.
- **Other fixed or capped fees** – For work not covered by a fixed fee from the pricing schedules, the law firm shall, at the very least, be expected to provide a one off fixed or capped fee, taking into account the hourly rates set out in the pricing schedule.
- **Hourly rates** – If a fixed or capped fee is not considered possible by the law firm because of a particular uncertainty regarding the scale of the work involved, it shall be allowed to complete the work on hourly rates, provided that it shall always provide the member with an explanation and provide a reasonable estimate for the work.

- Non-exclusive, can be used alongside existing suppliers
- Users can select a supplier by direct call-off or mini-competition:
  - *If any Contracting Body decides to source any of the Services from the Law Firm through this Agreement then it may in its sole discretion:*
    - A. award work without reopening competition (Direct Award)
    - or
    - B. award work following a mini-tender

- *Award work without reopening competition where it deems the Law Firm to represent the most economically advantageous solution for such Services as compared to other legal providers that are able to provide the Services*
- Not just about price; may use judgement to take into account other criteria on a case by case basis, e.g. experience, expertise, familiarity with your housing stock, leases etc.
- Members may approach multiple firms to get an assurance about who would do the work, confirm that they have availability and get some form of fee estimate.
- Members will need to agree a business case with CHIC for any direct award in excess of £179,000 (excluding VAT)



- May be appropriate where fees may be significant or for a sole supply contract, e.g. annual retainer
- “*(...the right is reserved to use different criteria including the price: quality evaluation, than the criteria used in the tender).* E.g. can decide to evaluate on Price alone
- Kennedy Cater is able to provide a tender template, advise on approach and completion of tender documentation.
- Default is to run any mini competition through CHIC eSourcing

# RECORDING DETAILS OF THE INSTRUCTION

<b>Contracting Body</b>	<i>[Contracting Body]</i>
<b>Contracting Body's Address for Invoicing:</b>	<i>[Name] [Address] [Tel no.]</i>
<b>Purchase order number (if applicable)</b>	<i>[Purchase order number]</i>
<b>Instructing Officer</b>	<i>[Name]</i>
<b>Law Firm</b>	<i>[Name] [Address] [Tel no.]</i>
<b>Matter Partner</b>	<i>[Name &amp; Title] [Tel no.] [e-mail address]</i>
<b>Other lawyers working on the matter for the Contracting Body and their respective roles</b>	<i>[Names &amp; Titles] [Tel no.s] [e-mail addresses]</i>
<b>Services (name of matter or case and brief description)</b>	<i>[name of matter or case and brief description]</i>
<b>Commencement Date</b>	
<b>Date for Completion of the Services</b>	
<b>Estimated, capped or fixed Fee and basis of charging</b>	<i>[Please give details including amount]</i>
<b>Estimated potential disbursements</b>	<i>[Please give details including amount if possible]</i>
<b>Requisite Level of Professional Indemnity Insurance and details of insurer</b>	<i>[Lot 1, Lot 3 &amp; Lot 4: £10,000,000 as a minimum; Lot 2: £5,000,000 as a minimum] [name and address of insurer]</i>
<b>Special Terms:</b> <i>[Insert details of any special terms and conditions relating to the Call Off Contract]</i>	

All suppliers will provide:

- free training commensurate with member's spend with the supplier:
  - Bespoke sessions at firm's or member's office or on line
  - Access to general training sessions, webinars etc
- 20 minutes free advice per potential new instruction
- a range of additional value added benefits, including:
  - use of their meeting rooms
  - library research facilities
  - legal updates
  - secondments

Kennedy Cater will send members a weekly newsletter providing details of all free training opportunities.

Full details of what is offered by each supplier is included in the Directory.

- Suppliers are offering a range of social value benefits in the following categories:
  - Social & Community
  - Health & Wellbeing
  - Crime & Justice
  - Economy
  - Education & Skills
  - Jobs
  - Environmental
- Each supplier has committed to a minimum of 1% of the annual contract values awarded via the framework.
- CHIC's Social Value Manager will liaise with each supplier to confirm delivery of their contribution.
- Full details of what is offered is included in the Directory

Suppliers will submit to Kennedy Cater on a monthly basis:

- Details of each invoice submitted to each CHIC member during the previous month.

Details shall include:

- Lot
- Matter reference and brief description
- Instruction date and instructing officer
- Invoice number and date
- Name of fee earner
- Fee quoted and fee code
- Fee type: fixed, capped or hourly rate
- Fees invoiced
- A soft copy of each invoice
- Details of any Value Added and Social Value Benefits provided to members

The Management Fee will apply to any instructions where the Pricing is applied.

Kennedy Cater will invoice each firm on a quarterly basis, for the Management Fee



- Kennedy Cater will produce a detailed Monthly Management Information report for each member summarising their use of the framework, e.g.:
  - Monthly and YTD spend per supplier/lot
  - Split between fixed fees & hourly rate spend
  - Monthly & YTD savings per firm/lot
  - Value Added and Social Value Benefits provided.
- Kennedy Cater will also spot check the invoices for accuracy and adherence to the framework Pricing and advise the member of any issues.
- At least once a year, Kennedy Cater will meet each supplier to discuss the operation of the framework and how performance could be improved.

- Quickview Panel Firms & Areas – An overview of the Panel & firms per Lot
- Lot descriptions – Description of the types of work covered under each Lot.
- Pricing schedules – List of fixed fees and hourly rates provided by each firm for each Lot.
- Firm contact details and Helpline Service – Key contact for instructions and Helpline service for each firm and Client Relationship Partner for each firm.
- Benefits – Extensive list and description of the Value Added and Social Value Benefits offered by each firm under each Lot.
- Framework Agreement
- Call-Off Contract Form – Template to be used at the beginning of any instruction.
- User Guide



## Members:

- Before the end of June, Kennedy Cater will send the Framework Directory to all users of the current framework and offer to meet with them to explain the features and benefits of the new framework.
- Members are invited to promote the framework internally and with any existing or potential new CHIC members

## Suppliers:

- Before the end of June, Kennedy Cater will arrange to meet all suppliers which are not on the current framework, to explain how the MMI reporting should work

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# Q&A Panel

# THANK YOU

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