



Cold to Cosy Homes

Invitation to Tender for

- **Installation of Draught Proofing**

25 July 2019

Quotations are invited from organisations suitably experienced and qualified to implement a draught proofing service in districts of Cumbria on behalf of Cumbria Action for Sustainability. Part of our project Cold to Cosy Homes, funded by the Energy Redress Scheme.

1. Background Information

Cumbria Action for Sustainability (CAfS) has been named as one of 15 charities from across the UK being awarded national funding that will see thousands of households saving energy, money and living in warmer, more efficient homes.

We've been awarded £148,000 from the Energy Saving Trust as part of the Energy Redress Scheme, announced earlier this year, which redistributes voluntary payments from UK energy companies.

The grant means CAfS can help more than a thousand Cumbrians to reduce their heating bills and get warmer, more comfortable homes. The new Cold to Cosy Homes scheme will offer advice visits for around 600 homes and provide energy saving installation for a significant proportion of them.

Trained energy saving assessors will provide energy advice and assess homes for energy saving measures. The assessor fits easy measures during the visit, such as LED lighting and easy to fit draught proofing, and will for appropriate households refer for professionally fitted draught proofing.

CAfS have extensive experience deploying such schemes recently and have to date completed draught proofing in over 300 homes, with high quality professionally installed fitting.

Our project has the support of the 3 local authorities that we are focussing the project on along with a number of other organisations.

This invitation is for tenders for:	<ul style="list-style-type: none"> • Installation Service - fitting draught proofing and energy saving improvements.
And excludes :	<ul style="list-style-type: none"> • Cost of draught proofing and energy saving improvements – which should be purchased by the contractor and invoiced separately.
And applies to:	<ul style="list-style-type: none"> • Domestic properties in Cumbria, but primarily in • Carlisle District • Eden District • South Lakeland District



No of installations:	<ul style="list-style-type: none">• Around 360 homes to be fitted between Sept 2019 and Jan 2021.• As a guide approx 100 each in Carlisle District, Eden District and South Lakeland District• With remainder in other districts, mostly Allerdale.
Key Dates:	<ul style="list-style-type: none">• Register interest as soon as possible and by 09/08/2019 at the latest.• Tenders to be received by: 15/08/2019



2. Energy saving improvements that can be installed depending on requirement of property/agreement with householder.

The type/model of measures is specified by CAfS with a target purchase price. Recommendations for alternatives are welcome, but require CAfS approval prior to supply and installation.

Area	Measure
Doors	Door brush strip
Doors	Full door seal large
Doors	Key hole brush
Doors	Letter box covers
Doors	Adjust door closing mechanisms to improve closure
Chimneys	Chimney sheep /chimney balloon
Windows	Compression Seal
Loft Hatches	Seal and hook and eye clips
Walls, ceilings and floors	Seal gaps
Damp	Dampness/humidity meter
Safety	Carbon Monoxide Alarm
Other	Exceptionally other measures specified and agreed with installer



4. Roles

CAfS – coordinate project, identify clients through existing networks and community events, manage the service to meet targets within budget and maintain quality of service through inspection and/or audit, or any other agreed methodology.

Energy Assessors – identify clients through existing networks and community events, visit clients providing an energy assessment, fitting of basic measures, provide tariff advice, agree with client draught proofing products to be professionally installed.

Contractor – coordinate with CAfS to receive client information and specification of works. Purchase products and implement fitting process. Arrange with client to fit draught proofing within agreed timescales, provide a professional fitting service that is of a standard agreed with CAfS. Follow up any queries from clients and resolve any issues that may arise as a result of the fitting, including refitting, adjusting where necessary and repairing any damage that should arise during installation.

6. Services

Organisations are invited to tender to provide services for the project (all districts or specific district(s)). The service should commence as soon as practical following appointment of the successful tenderer, with a target of mid to late September 2019 to commence installations.

Installation Service - Providing a suitably skilled installation person or team – who are qualified and experienced to provide fitting of draught proofing items in homes.

Installation person or team with proven reliability in completing work and maintaining appointments. Installation person or team to:

1. Liaise with CAfS to receive client referrals, job specifications following the assessment visits and review work specifications as appropriate.
2. Book client appointments for the installation visit, following an agreed policy to ensure appointments are offered an installation booking within 3 weeks of the referral being received and factoring in locations to minimise travel cost and time.
3. Check job specifications for products required against Contractors stock held for each installation.
4. Purchase draught proofing products from specified list of products and maintain stock levels as required
5. Review job specifications, to ensure work can be carried out on the day and tools and equipment are available.
6. Resolve any details in the job specification with CAfS or the energy assessors and agree any changes as required.
7. Attend booked appointments with appropriate materials, equipment and tools.
8. Outline to customer the installation processes and what products are being installed.
9. Install products.
10. Record installation of products and any issues/variation on the job specification.
11. Review installed products with customer, where possible, demonstrating how products perform to reduce draughts, ensuring the customer is satisfied with the installation and the tidiness of the work and that they understand any changes eg how doors and windows operate with the products installed.
12. Explain what the customer should do if they have any problems with the installed products.
13. Leave customer's property tidy.



14. Follow up any queries or complaints that may arise from clients following the installation visit.

The service should be implemented in line with service values outlined in Appendix C and in a manner that builds a strong reputation for the service and all parties involved. This will help to create customer to customer referrals and achieve the project targets.

Activity	Personnel skills and organisation capability	Equipment	Other requirement	Projected Duration per client
Administration and customer liaison (pre and post visit)	Customer service skills and ethos	Secure data sharing capability with CAfS and assessors.	<ul style="list-style-type: none"> Data sharing capability with CAfS and assessors in line with data protection legislation and requirements. Customer satisfaction surveys 	0.25 hours
Draught proofing installation	Building maintenance. All types of products are easy and quick to fit items.	Appropriate tools Suitable vehicle for transit of equipment and tools		1 – 2 hours
General	Suitable qualifications to provide in home installations. Additional mandatory training. Champion the project and help raise profile with clients to build further referrals		<ul style="list-style-type: none"> DBS Basic check at least for all staff who visit clients' homes if required. Photo ID 	One off training 3.5 hours
Purchase items and maintain stock levels	Organisational		<ul style="list-style-type: none"> Ordering and storage requirement 	0.25 hours

*Training provided by CAfS and anticipated to be a Penrith location – without charge to contractor(s). Tenders should include costs (time, travel etc) for attendance by installation providers.

7. Your Submission

When submitting your proposal, please provide:

A clear method statement: to outline how you will implement a Draught Proofing Installation Service that meets the requirements outlined in this document, in particular addressing:

Key Outcomes: how many installations per year can be achieved and what regions can be targeted?

Tender Price:

Based on details of installation types and volumes in Appendix B. Provide detailed costs to provide:

- Time for administration and purchasing products (excluding product costs)
- Installations as described for fitting the products in the example installation list



- Travel cost and time

Contractors should have scope to allow for grouping jobs geographically so that travel costs and time are minimised, with typically 2 to 3 jobs that can be completed in a normal working day. Please provide a tender price for one installation.

Capacity: ability to install the number of homes in the timescale.

Key Delivery Staff: a person specification highlighting relevant qualifications and experience of all key staff or teams should be included.

Track record: detail your organisation's experience of carrying out similar work, and any other information about suitability to deliver this work. Specifically the tenderer should demonstrate their capability and strengths in:

- Customer relationship management – handling customer bookings; including handling queries and bookings with vulnerable and elderly clients; scheduling and liaising with other parties.
- Job scheduling, monitoring processes and maintaining quality – ensuring jobs are efficiently scheduled meeting agreed timescales and customer expectations.
- Proven quality of work – evidence that an assurance process is in place that demonstrates work standards meet specifications and customer expectations.
- Proven customer satisfaction – evidence that an effective customer satisfaction process is operational.
- Purchasing and stock control – procurement and handling of approved draught proofing products; storage, stock control and distributing to fitting team.
- Handling and resolving issues or complaints – evidence of an effective and customer orientated complaints and resolution process.

Purchase and stock control plan: Detail how your organisation would manage purchasing and stock control of draught proofing equipment (from the approved list of products agreed with CAfS) to be agreed with CAfS at inception meeting. See Appendix B for a breakdown of a typical install.

Insurance & compliance: All tenderers are expected to hold public liability insurance to £1,000,000 minimum and professional indemnity insurance to £500,000 minimum. All applicants are also expected to demonstrate awareness of relevant legislation around data and information security and demonstrate that they have the systems in place to comply with the requirements of the Data Protection Act. All applicants are expected to be aware of, and to comply with, the requirements of equality legislation. Tenderers should also have in place:

- Suitable Health and Safety policy
- Policy to comply with requirements to safeguard vulnerable adults
- Fitting staff should hold satisfactory DBS checks

Tenderers should include a statement in their submission that they comply with these requirements.

Environmental sustainability: Tenders to include a statement on how they will minimise the environmental impact of their work.

Financial Sustainability: Tenderers to provide evidence of financial sustainability and business continuity to provide confidence that they will be able to delivery stated requirements for the whole period. This may include (but is not limited to):

- three years of accounts
- profit and loss statements for the last three years



- business plan

Referees: Names and contact details of two referees.

Submissions should be no more than 12 sides of A4 in equivalent of Arial 11 point font (excluding appendices).

8. Application Process & Selection Criteria

Please initially **register an interest** by emailing CAfS at the address below, then **submit your tender** by email or in hard copy to:

Cumbria Action for Sustainability, Eden Rural Foyer, Old London Road, Penrith, CA11 8ET

Email: office@cafs.org.uk

See front page for key dates to complete this by.

Shortlisted applicants will be invited to interview.

Selection of the successful candidate will be undertaken by representatives of Cumbria Action for Sustainability and will be in accordance with CAfS Procurement Policy.

The scoring matrix used for the selection process will be weighted as follows:

- I. Skills, capabilities and experience of installation staff– 25%
- II. Proven customer satisfaction – 25%
- III. Skills, capabilities and experience of customer service staff– 25%
- IV. Tender price – 25%

Assessment of insurance, compliance, environmental and financial sustainability will be on a pass/fail basis.

9. Project Management & Reference Materials

The Draught Proofing Installation Service contract will be managed by Cumbria Action for Sustainability.

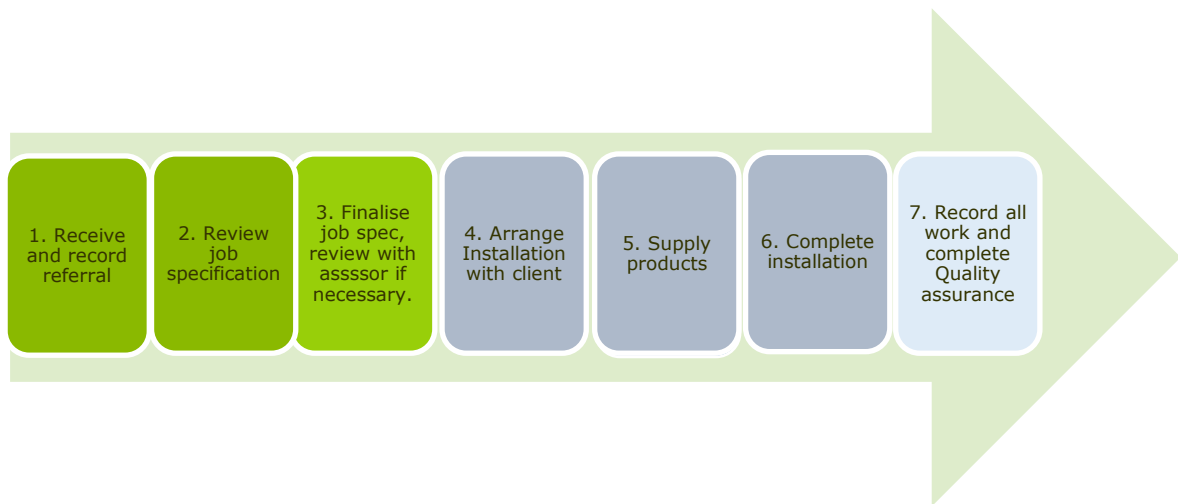
The successful organisation will be expected to attend an inception meeting at the start of this work with CAfS, and provide regular updates to the CAfS Contract Manager on progress on a monthly basis against key installation targets.

Key background documents to support this work include the Cold to Cosy Homes Project Plan.



Appendix A – Draught Proofing Process Flow

The role within the project of the contractors also is to create more referrals by highly satisfied customers recommending service to others.





Appendix B – Installation types

Fitting with small range of typical draught proofing and other energy saving improvements.

Example typical installation for purposes of tendering:

- 2x Door brush strip (screw on type)
- 2x Full door seal (screw on type with metal frame)
- 1x Key hole brush
- 1x loft hatch draught proofed (removed and draught proofing strips and clips applied)

Note that the cost of materials for draught proofing and energy saving improvements should not be included in the tender price. These would be billed separately to CAfS.



Appendix D – Service Values

- Installation service staff should understand the needs of older people and other vulnerable groups, maintaining a clear service user focus, putting client satisfaction first.
- The installation should be undertaken at times which have been agreed in advance with the customer user.
- Confidentiality regarding all customer user information should be maintained at all times, and information should not be shared with any other parties in the service.
- Customers cultural, social, religious and language requirements and preferences should be respected at all times.
- The service should be delivered in a way which demonstrates an understanding of the any particular customer’s capabilities e.g. disability, mental health needs and communication.
- The customer will always retain the right to determine what takes place in their own home.
- Respect for the customer’s home environment is demonstrated e.g. by minimal disturbance being caused and homes should be left clean and tidy after every task.
- No monetary transactions should take place between the installation service and customer on their premises - with the exception of paying clients where quotes are paid for using processes agreed with CAfS.