**Cold to Cosy Homes Cumbria**

**24th April 2022**

**Draughtproofing Installation Contractor**

**We are currently looking for Expressions of Interest from Sole Traders and organisations that are suitably qualified and/or experienced to deliver a draughtproofing service to homes within Cumbria, or in specified districts within Cumbria.**

**Background** **Information**

Cumbria Action for Sustainability (CAfS) provides a comprehensive energy advice and draughtproofing service to homes throughout Cumbria, funded by the Energy Redress Scheme.

Trained energy advisers will provide energy advice and assess homes for energy-saving measures. “Easy measures” such as LED lighting and easy-to-fit draughtproofing will be posted to householders. Advisers will refer appropriate households for professionally fitted draughtproofing installation. The present contract is for this Installation Service.

CAfS has extensive recent experience of deploying such schemes, and has to date fitted draughtproofing in over 300 homes, with high-quality measures professionally installed.

Our project has the support of all local authorities in Cumbria along with a number of other organisations.

More details of the scheme available at www.cosyhomes.org.uk.

|  |  |
| --- | --- |
| **This contract will be to deliver:** | * Installation Service – to join our team of professional installers to fit draughtproofing and energy-saving improvements in clients’ homes |
| **And excludes**: | * Cost of materials for draughtproofing and energy-saving improvements |
| **And applies to:** | * Domestic properties in Cumbria |
| **No of installations:** | * Dependent upon need within the area, and your availability to work / travel |
| **Key Dates:** | * **Please apply as soon as possible - recruitment is ongoing.** |

**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.

|  |  |
| --- | --- |
| **Area** | **Measure** |
| Doors | Door brush strip |
| Doors | Full door seal, large |
| Doors | Keyhole brush |
| Doors | Letterbox covers |
| Doors | Adjust door-closing mechanisms to improve closure |
| Chimneys | Chimney sheep / chimney balloon |
| Windows | Compression seal |
| Loft Hatches | Seal; 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 |

**Roles**

**Draughtproofing Installation contractor** –coordinate with CAfS to receive client information and specification of works. Purchase products and implement fitting process. Arrange with client to fit draughtproofing 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. This includes refitting, adjusting where necessary and repairing any damage that arises during installation.

Which would be supported by:

**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 Advisers** – CAfS team of contractors, providing energy advice calls, visits, and tariff advice. During home visits, the advisers fit simple energy-saving measures (e.g. LED lightbulbs, basic draughtproofing) and agree with clients the draughtproofing products that will be professionally installed at a later date.

**What are we looking for?**

Organisations, sole traders/self-employed are invited to express an interest to provide services for the project (all districts or specific district/s of Cumbria). The service should commence as soon as practicable following appointment of the successful tenderer.

A suitably skilled installer or team – qualified and experienced to fit draughtproofing items in homes.

Installer or team with proven reliability in completing work and maintaining appointments.

Installer or team who will:

1. Liaise with CAfS to receive client referrals, receive job specifications following the adviser visits, and review work specifications as appropriate, using the CAfS IT systems.
2. Book clients’ appointments for installation visits, adhering to an agreed policy to ensure that appointments are offered and installations booked within 3 weeks of the referral being received, and factoring in locations to minimise travel cost and time.
3. Complete the CAfS Risk Assessment (Covid-19) process as required when booking the visit and on the day before the visit.
4. Check job specifications for products required against contractor’s stock held for each installation.
5. Purchase draughtproofing products from a specified list of products, and maintain stock levels as required.
6. Review job specifications, to ensure that work can be carried out on the day and tools and equipment are available.
7. If any details in the job specification need clarification, raise this with CAfS or the energy advisers and agree any changes as required.
8. Attend booked appointments with appropriate materials, equipment and tools.
9. Follow Covid-19 safety procedures as outlined by CAfS.
10. Outline to clients the installation processes and what products are being installed.
11. Install products.
12. Record installation of products and any issues with/variation on the job specification.
13. Review installed products with client, 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, e.g. how doors and windows operate with the products installed.
14. Explain what the client should do if they have any problems with the installed products.
15. Leave client’s property tidy.
16. Follow up any client queries or complaints that may arise after 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 client-to-client referrals and achieve the project targets.

**Expected Activity**

| **Activity** | **Personnel skills and organisation capability** | **Equipment** | **Other requirement** | **Projected duration per client** |
| --- | --- | --- | --- | --- |
| Pre-delivery mandatory training | Person responsible for delivering the draughtproofing | Ability to access the internet |  | One-off training, 3.5 hrs |
| **Delivering Draughtproofing** | | | | |
| Administration and customer liaison (pre- and post- visit) | Customer service skills and ethos | Ability to share data securely with CAfS and advisers via laptop/PC. | Ability to share data securely with CAfS and advisers, in line with data protection legislation and requirements | 0.5 hours |
| Draughtproofing installation | * Building maintenance. * All products are easy and quick to fit items. | Appropriate tools.  Suitable vehicle for transporting equipment and tools |  | 1-2 hours |
| General | * Suitable qualifications to provide in-home installations. * Champion the project and help raise profile with clients to build further referrals. |  | * DBS Basic check for all staff who visit clients’ homes if required. Less than 1 year old * Photo ID |  |
| Purchase items and maintain stock levels | Organisational |  | * Coordinate with service provider to pre-purchase stock items. * Maintain stock control. Reorder as appropriate. * Ordering and storage requirement. | 0.25 hours |

**\*Online Training provided by CAfS without charge to contractor(s). Tenders should include costs (time, travel etc.) for attendance by installation providers.**

**Your Submission**

To share an Expression of Interest in this work either, drop an e-mail to [gareth.field@cafs.org.uk](mailto:gareth.field@cafs.org.uk) to arrange a chat.

Or submit an expression of interest, please provide as best as possible:

**A description of the organisations submitting an expression of interest:** This should describe you as a sole trader or organisation. How you are set up as a business and size of your business. Contact details and address. Key members of staff who will be involved.

**Explanation as to how you will deliver the service:** to outline how you will implement a Draughtproofing Installation Service that meets the requirements outlined in this document.

**Where you want to deliver:** Let us know where your base is and whereabouts in Cumbria you feel you can deliver draughtproofing.

**Capacity:** ability to fit measures in the number of homes within the timescale.

**Track record:** detail your experience of carrying out similar work, and any other information about suitability to deliver this work. Specifically, the expression of interest should demonstrate capability and strengths in:

* Handling customer bookings; including handling queries and bookings with vulnerable and elderly clients; scheduling and liaising with other parties.
* Ensuring that jobs are scheduled efficiently, meeting agreed timescales and customer expectations.
* Proven quality of work – demonstrating that work standards meet specifications and customer expectations.
* Proven customer satisfaction
* Handling and resolving issues or complaints.

**Purchase and stock control:** Detail how your organisation would manage purchasing and stock control of draughtproofing equipment (from the approved list of products agreed with CAfS). See Appendix B for a breakdown of a typical install.

**Insurance & compliance:** All deliverers 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 GDPR. All applicants are expected to be aware of, and to comply with, the requirements of equality legislation. You should also have in place:

* Suitable Health and Safety policy
* Policy to comply with requirements to safeguard vulnerable adults
* Satisfactory basic DBS checks held by fitting staff

Evidence of these will be asked for before any contract is started.

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

**Financial Sustainability:** Tenderers to provideevidence of financial sustainability and business continuity to provide confidence that they will be able to deliver 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

If you are a new start up or have limited history of operations then please share how you hope to maintain financially stable.

**Referees:** Names and contact details of two referees.

Submissions should be no more than 12 sides of A4 (excluding appendices).

**Application Process & Selection Criteria**

If you are interested and wish to find out more, please get in touch directly, to have an informal chat around the work. E-mail [gareth.field@cafs.org.uk](mailto:gareth.field@cafs.org.uk)

To submit an expression of interest including the information requested, email this documentation to [gareth.field@cafs.org.uk](mailto:gareth.field@cafs.org.uk) or post it to:

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

On receipt of your submitted expression of interest, we will be in touch for an informal chat around your interest and to find out more about your work.

After this we will discuss the next steps in your application for the work. This will involve adding to your expression of interest to cover any areas that may be lacking in evidence.

Selection of successful candidates will be undertaken by representatives of Cumbria Action for Sustainability and will be in accordance with CAfS Procurement Policy. This will include what you have submitted in your expression of interest and an interview with the project manager.

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

**Project Management & Reference Materials**

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

The successful sole trader/organisation will be expected to attend an inception meeting at the start of this work with CAfS, and provide regular updates to the Cold to Cosy Homes team on progress.

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

**Appendix A – Draughtproofing Process Flow**

Another aspect of the contractor’s role within the project is to generate more referrals, via recommendations of the service by highly satisfied customers.

Steps 1 – 3 are completed by CAfS and steps 4 – 6 by the contractor, 7 by CAfS

**Appendix B – Installation types**

Fitting with small range of typical draughtproofing and other energy-saving improvements.

Example of a typical installation for purposes of tendering:

* 2x Door brush strip (screw-on type)
* 2x Full door seal (screw-on type with metal frame)
* 1x Keyhole brush
* 1x loft hatch draughtproofed (removed, and draughtproofing strips and clips applied)

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

**Appendix C – Service Values**

**•** Installation service staff should understand the needs of older people and other vulnerable groups, maintaining a clear service user focus, and putting client satisfaction first.

• The installation should be undertaken at times which have been agreed in advance with the client.

• All client information should be kept confidential at all times, and information should not be shared with any other parties in the service.

• Clients’ 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 any particular client’s capabilities e.g. disability, mental health needs and communication.

• The client will always retain the right to determine what takes place in their own home.

• Respect for the client’s home environment shall be demonstrated e.g. by causing minimal disturbance and leaving homes clean and tidy after every task.

• No monetary transactions should take place between the installation service and client on their premises – with the exception of paying clients receiving quote-based services that are paid for using processes agreed with CAfS.

**Rates for delivery**

|  |  |  |
| --- | --- | --- |
| **Activity** | **Expected time** | **Rate** |
| Initial training | 2 hrs | No fee for this training |
| Travel | Up to 1-2hrs | £25/hour  45 pence per mile |
| Administration per visit  Co-ordination with CAfS, arranging visit with client, appropriate supplies, etc… | 30mins | £25/hour |
| Draughtproofing | 1-2hrs | £25/hour |
| Ongoing training as agreed by CAfS |  | £25/hour |
| Purchase of DP supplies |  | Purchased and invoiced to CAfS at cost |