



Draught Proofing Project - Invitation to Tender

Installation Service

29 August 2014

Quotations are invited from organisations suitably experienced and qualified to implement a draught proofing installation service on behalf of Cumbria Action for Sustainability as part of the BIG Lottery funded Sustain Eden Programme.

1. Background Information

Cumbria Action for Sustainability (CAFS) is the lead organisation in a partnership of voluntary, statutory and private sector organisations.

This partnership was one of only 12 localities across England to be awarded just under £1 million from the Big Lottery Fund Communities Living Sustainably Programme.

It was established in response to the following needs of the Eden community:

- High incidence of fuel poverty;
- Rural isolation and poor access to services;
- High carbon footprints;
- Limited sustainability and resilience planning at community level (including limited knowledge & resource sharing).

The funding will be used to develop a range of projects with partner organisations and communities designed to **deliver a more resilient Eden, capable of responding to the impacts of climate change.**

The programme runs until November 2015, and consists of a series of projects including:

- Draught proofing for hard to treat older homes
- Advice on resource and energy efficiency
- Reducing local energy costs
- Community emergency planning
- Trial bus and car sharing schemes
- Supporting community led resource efficiency projects

More information about the programme can be found at www.cafs.org.uk/sustaineden

2. Sustain Eden Outcomes

The programme sets out to achieve the following outcomes, which were established by the multi-sector partnership during the project's development phase.

1. Communities in Eden are provided with affordable, appropriate solutions to use energy more efficiently and reduce the incidence of fuel poverty.

2. Rural, isolated communities in Eden have improved access to services, including greener transport options.
3. Communities, households and businesses in Eden use their land and natural resources more efficiently for climate change mitigation and adaptation activities.
4. Isolated and vulnerable communities in Eden are better prepared for the impacts of extreme weather caused by climate change.
5. Communities in Eden have a greater awareness and understanding of the impacts of climate change, and have more opportunities to undertake sustainable activities and reduce their carbon footprints.
6. Communities in Eden maximise the sharing of new and existing skills and resources, embedding these practices into long term policy and creating new economic opportunities and solutions to provide sustainable activity in the longer term.

3. Draught Proofing Service

Implementing a draught proofing service is part of the Cold to Cosy Homes project and aims to tackle fuel poverty especially in homes of vulnerable people, particularly rural homes. The aim is to draught proof 150 homes by August 2015 at no cost to the qualifying householder. Qualification comprises:

- People who live in Eden District, and are
- Over 60 year old and on a low income, or
- Under 60 and in receipt of a means tested benefit, or
- A member of the household has a disability or long term health issue.

Draught proofing measures included in the scheme, typically include:

- Chimneys – balloons and other devices
- Doors – seals and brushes
- Windows – wide range of draught proofing strips
- Letter box covers
- Key hole covers
- Sealing gaps around doors and window frames and floors
- Loft hatches seals
- Fixing windows that are faulty
- Adjusting doors which don't close properly

In addition to draughts the service may include other measures:

- Radiator reflectors
- Immersion jackets
- Carbon monoxide detectors
- Other energy saving devices

Where people don't qualify for the free service they may pay for a draught proofing assessment and can be provided with a quote for the installation, which they can choose to proceed with. These paid-for fittings do not count towards the 150 target for homes fitted and are additional to this. Appendix A shows an outline of stages in the draught proofing process.

4. Roles

CAfS in partnership with Eden Housing Association are fulfilling roles in the initial stages of the service process and this tender focusses on the provision, installation and management of the draught proofing improvements.

CAfS – promote service, 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.

Eden Housing Association – provision of energy assessment visits – Visiting clients to assess homes for draughts, compiling and agreeing with householder a specification of draught proofing and energy saving improvements to be installed. This is conducted by an appointed Winter Warmth Advisor who also provides fuel bill switching advice.

Contractor – purchase products and implement fitting process. Arranging 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.

5. Draught Proofing Service Pilot

A pilot exercise of the draught proofing service has been underway since June 2014 to trial and prove the service concept, monitor the response of clients and establish the range of most effective draught proofing products to install.

In the pilot the services of Eden Housing Association were utilised to provide the installation service and the assessment service was conducted by CAfS.

6. Installation Service

Organisations are invited to tender to provide the Installation Service of the Cold to Cosy homes draught proofing service. Installations should commence as soon as practical following appointment of the successful tenderer, with a target of 150 installations by Aug 2015.

This service comprises:

- Providing a suitable and efficient administration service to:
 - Liaise with Eden Housing Association (draught proofing assessment service) to receive client referrals, job specifications following the assessment visits and review work specifications with CAfS and the assessment service as appropriate.
 - Book appointments for installation, following an agreed policy to ensure appointments are booked factoring in locations and estimated duration on site.
 - Check job specifications for products required against stock held for each installation.
 - Purchase draught proofing products and maintain stock levels as required.
 - Verify that the installer has completed work and job specifications are completed to an agreed standard, and send/share completed job specifications to CAfS and the Assessment Service.
 - Resolve any issues with the installer, Assessment Service and CAfS to ensure installations are completed as specified, to a suitable standard and to meeting customer expectations.
 - Invoice CAfS monthly (or a frequency to be agreed) for draught proofing products purchased and fitting costs.
 - Implement a customer satisfaction process to gain and evaluate customer feedback on the installation.

- 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 to be DBS checked and with proven reliability in completing work and maintaining appointments. Installation person or team to:
 - Review job specifications, and any photographs as required, to ensure work can be carried out on the day and tools and equipment are available.
 - Resolve any details in the job specification with the assessor and agree any changes as required.
 - Attend booked appointments with appropriate draught proofing products, equipment and tools.
 - Outline to customer the installation process and what products are being installed.
 - Install products.
 - 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.
 - Explain what the customer should do if they have any problems with the installed products.
 - Leave customer's property tidy.

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 installation target.

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 your organisation can meet, and potentially exceed, the target of 150 installations between Oct 2014 and Aug 2015 in line with the aims of the project.

Tender Price: based on details of Installation types and volumes in Appendix B. Provide detailed costs to fit:

- 1 Standard Installation as described for fitting the products in the example installation list
- 1 Comprehensive Installation as described for fitting the products in the example installation list

This should include providing the administration and installation, but exclude the costs of draught proofing products. All other expenses should be included. Scheduling of installations should allow for grouping jobs geographically so that travel costs and time are minimised.

Capacity: ability to install the target number of homes in the timescale and whether additional capacity exists or is available to provide additional installations for paying clients.

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 the fitting team; carry out satisfaction surveys.
- 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 typical products.

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 submit your tenders by email or in hard copy to:

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

Email: andrew@cafs.org.uk

Deadline: Friday 19 September 2014, 12pm.

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 Cold to Cosy Homes contract will be managed by Cumbria Action for Sustainability with support from the Programme Steering Group.

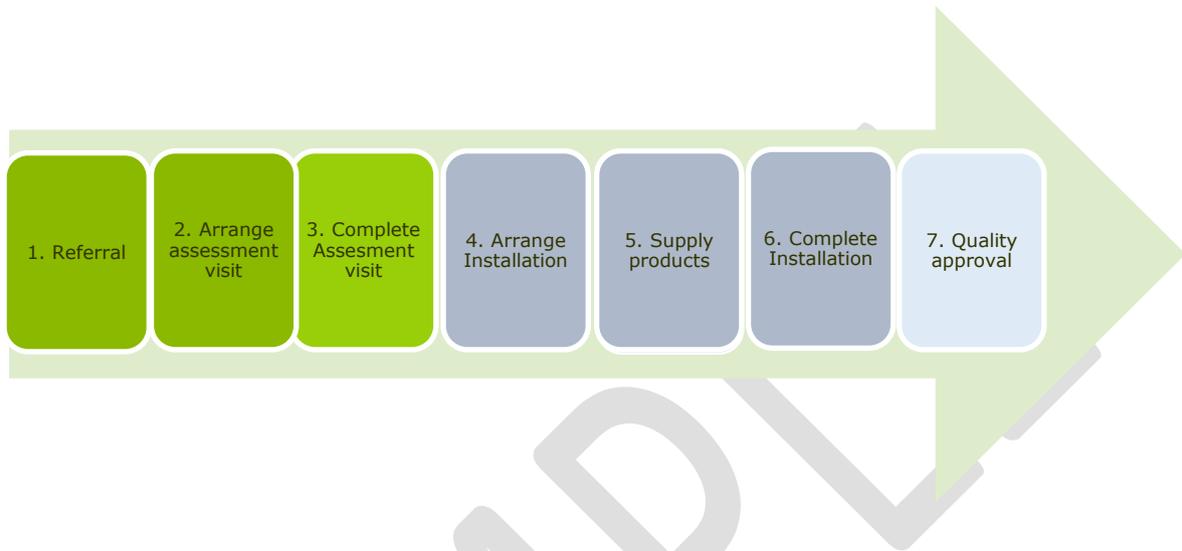
The successful organisation will be expected to attend an inception meeting at the start of this work with CAFS, and provide regular updates to the CAFS Contract Manager on progress on a monthly basis against key installation targets.

Key background documents to support this work include the Sustain Eden Project Delivery Plan.

Appendix A – Draught Proofing Service Process Flow

Installation Service mainly comprises stages 4, 5, 6 and 7.

Installation Service also has a role to help build more referrals by satisfied customers recommending service to others.



SAMPLE

Appendix B – Installation types and volumes

Standard Installation

130 homes - fitting with small range of typical draught proofing, with total cost of measures £120.00 maximum. Duration of fitting typically 3 hours (1 professional installer). All products and equipment to be fitted according to manufacturer's instructions.

Example installation:

- 1 door seal, top and sides of door
- 1 Letter box cover
- 1 Key hole cover
- 1 Brush strip at bottom of door
- Simple draught proof strip to 1 window
- Draught proof 1 loft hatch
- Fitting 1 Carbon Monoxide detector

Comprehensive installation

20 homes – where circumstances require a wider range of draught proofing and energy saving (eg a vulnerable client with draughty & poorly insulated). Total cost of measures £300 maximum. Duration of fitting typically 1 day (1 professional installer).

Example installation:

- 2 door seals, top and sides
- 1 Letter box cover
- 1 Key hole cover
- 2 doors – install brush strips at bottom
- Draught proof 1 loft hatch
- 2 rooms - sealing gaps between floors and walls, cracks in walls and ceilings
- 4 windows - simple draught proof strips
- 5 radiator reflector panels

If numbers requiring comprehensive installation are low, they may be replaced with a higher volume of standard installations.

Paid installations

For households not qualifying for the free service they may pay for a draught proofing assessment and will be provided with a quote for the installation, which they can choose to proceed with. Numbers of such installations are unknown and will not count towards the targets above.

Appendix C – 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.

