

## 1. CUSTOMER CARE AND QUALITY OF WORK

### 1.1 *The Tenderer's policy and procedures for working in Occupied Properties with particular attention to the safety and security of Tenants and their belongings* (2 x A4)

Contractor 5 (CONTRACTOR 5) is committed to ensuring that all tenants and Test Housing Association (Test HA) receive the very highest quality service. We adopt a customer focused approach and all staff, regardless of their individual role, are recruited and trained in providing a quality-driven service, adhering to the principles that all customers and clients can expect from us. In addition to our standard company policies and procedures, relating to working in occupied properties we ensure the following behaviours are integral to all our dealings with our customers:

- Deliver our services in a professional and friendly manner
- Treat them with courtesy and respect
- Deal with all requests or queries quickly and efficiently
- Provide accurate and clear information and advice
- Treat all customers equally and without discrimination
- Accommodate within reason any special requirements
- Minimise inconvenience to customers
- Be sensitive to customer, neighbour and other stakeholder needs
- Ensure security of tenants and their belongings at all times

#### **Code of conduct for working in and around occupied properties**

CONTRACTOR 5 has strict policies and procedures for working in and around occupied properties and all our operatives will undergo customer care training which ensures that they adhere to our “*Code of Conduct*”. This sets out the minimum standards of behaviour that we expect from our employees which is also in line with our clients’ *Code of Conduct for Contractors*. This means they are respectful of residents and their property, they will protect their home and belongings in accordance with our practical measures guidelines (e.g. using clean dust sheets) and they will ensure the safety and security of the residents at all times (e.g. through risk assessments carried out at the property and paying particular attention to vulnerable residents who may be elderly, mental health issues, infirm or those with young children, etc).

#### **Vulnerable People**

All CONTRACTOR 5 engineers are familiar in working in the social housing environment and where there may be vulnerable or elderly people living/present. Our staff will always be polite, well mannered, considerate and compassionate in the house holds when they are carry out works under this contract. In accordance with the “Protecting Vulnerable Groups Scheme”, we obtain and hold on file the Disclosure Scotland checks for all operatives who interact with members of the public either at induction, on award of new contract(s) and/or when a change is known. Current levels are:

- Protection Vulnerable Groups Scheme (PVG)
- Basic Disclosure contains only convictions considered unspent under The Rehabilitation of Offenders Act 1974
- Standard Disclosure contains all conviction information, spent and unspent, including cautions.
- Enhanced Disclosure contains all conviction information, spent and unspent, and any other non-conviction information considered to be relevant by the police or other Government bodies.

#### **Branding and Identification of Engineers**

All engineers involved across the gas servicing and maintenance contract Test HA will be directly employed by CONTRACTOR 5. Our in-house workforce will be smartly presented and clearly identifiable by displaying their unique photographic ID credentials (e.g. Gas Safe Registered card) on their CONTRACTOR 5 company branded uniforms at all times. All staff/operatives will arrive at the properties in one of our modern fleet of company vehicles (10 vans in total) which is livered in CONTRACTOR 5 branding.

## **Customer Care**

At the heart of CONTRACTOR 5's operations is our commitment to putting our customers first. We confirm our compliance with the Equality Act 2010 and our approach on all our contracts is to ensure a tailored service that accounts for individual needs such as language, culture, working patterns, mobility and lifestyle. We ensure a consistent service delivery that does not disadvantage any customer regardless of their personal circumstances.

## **Safeguarding and privacy**

We confirm our entire customer facing staff and operatives have been successfully Disclosure Scotland PVG checked. We also work in strict adherence to the requirements under the Data Protection Act, as evidenced by our ICO certificate of registration.

## **Making Appointments**

We issue appointment letters to tenants at least one full week in advance to the appointment date where we clearly outline what's required at the service visit; details of when the scheduled service is due and full contact details to contact us for more information or to re-arrange the date. When confirming appointments our coordinators are able to make arrangements for additional provisions to assist those who may be in need of assistant, i.e. moving equipment and furniture.

1.2 *The Tenderer's proposals for meeting appointment slots (2 – max 4 hrs) with the customer and client and details of how you will programme the works within the existing 10 month cycle and working with Test HA to reduce this to 11 months over the first 18 months of the contract? (1 x A4)*

To ensure maximising the percentage of appointments made are kept all co-ordination, management and workload of the gas servicing and maintenance contract will be through our CLICK system, developed specifically for delivering annual servicing, maintenance, repair and installation, to provide a single system for delivering a best practice solution. This system is fully integrated into all our business activities. During the asset verification period, appropriate due diligence will be carried throughout Test HA's property portfolio to ensure the building asset types are identified to allow the correct information to be logged into CLICK.

#### **How our CLICK system works for us**

Our CLICK system allows us to organise our business quickly and easily, managing the office, workforce, jobs, suppliers and customers. This central system not only allows CONTRACTOR 5 employees (i.e. office based and site operational staff) to access real time information easily, anytime, anywhere (i.e. using desktop PCs/laptops and mobile devices), but it also provides our clients the option of accessing their job-related information via a dedicated web portal. This permission based access portal means that Test HA officers can log into a safe and secure system to view the progress of their jobs in 'real time', including querying job information, view the history of their asset list maintenance information and also save and print forms related to their specific/particular job.

#### **Planned maintenance**

Our CLICK system has an electronic 12 month annual planned maintenance module which creates a planner. Set timeframes can be incorporated to ensure the Test HA proposed reduced cycle dates are met. This processes a work order when the date is due for a planned maintenance visit. One week before the due date of the planned maintenance visit we will either send an e-mail or our operations co-ordinator will telephone the property to confirm that the planned visit is due and confirm our engineer will be attending. This is also an opportunity for the client to ask for the visit to be re-scheduled if access isn't possible for any reason such as an event within particular area etc. Once we receive confirmation the planned visit can take place this then generates a works order with a service sheet to the engineer's tablet to attend site. The engineer will also sign in the site log book and request a property representative to sign the tablet on completion of the maintenance task.

#### **Van stock**

All engineers are allocated a company van with the necessary tools and equipment necessary to allow them to perform their role fully. Van stocks will be tailored to suite the specific requirements of the installed assets under this Test HA contract. All our vans are equipped with the necessary plant, equipment and spares to allow them carryout a "first time fix", or at the very minimum max safe, to the majority of emergency repairs (within the 2-4 hours stipulated). We will regularly review our materials requirements, any trends in usage, etc. to ensure there are no supply issues and that van stocks can be replenished daily. It is the responsibility of each engineer to ensure they have the tools for the works involved and to replenish their van stock as necessary; parts/materials, spares, tools and emergency kit, first aid, fire-fighting equipment, etc. Our engineers can use their tablets to access all manufacturers part lists, allowing them to identify and source the correct components directly whilst on site.

The Regulations came into force on 6 April 2018. This MOT-style change will allow Test HA to carry out their annual gas safety check in the two months before the due date and retain the existing expiry date. E.g. if your gas safety check is due 15th May, but it is carried out on the preceding 29th of April, the new certificate will retain the 15th May expiry date and there will be no foreshortening of the inspection period. This avoids Test HA waiting until the last minute and not gaining access, or having to shorten the annual cycle check to comply with the law.

1.3 *The Tenderer's proposals for providing a guaranteed 24-hour, 365 days a year out of hours Responsive cover in respect of attending any Emergencies arising directly out of the works being undertaken by the Service Provider on this Contract. (1 x A4)*

CONTRACTOR 5 will ensure the necessary staff and IT resources are in place to ensure we are able to support Test HA in line with the stipulations outlined in the contract and ITT documentation, in particular repair category times:

<b>Emergency:</b>	Attend the works within 4 hours of notification and restore services within 24 hours.
<b>Urgent:</b>	Attend the works within the first full working day and complete the works/restore services within 24 hours.
<b>Routine:</b>	Prompt attendance required from the Contractor and must be completed within 5 working days
<b>Right to Repair:</b>	Attend the works within 1 working day and will by the date specified on the works order
<b>Voids:</b>	Prompt attendance required works must be completed within 3/5 working day of notification

On the award of the contract CONTRACTOR 5 will issue a letter to all tenants notifying them of the appointment and also providing Test contact information for reporting faults etc. A pre agreed "fault solution" card will also be included within the introduction letter.

**A continuously manned 24/7, 365 days a year call-out service**

We will provide a 24/7, 365 days a year call-out service for all breakdowns, failures and emergencies. A dedicated email and local telephone number will be available, ensuring all calls received from tenants and call-offs from Test HA are dealt with prompt and efficiently, in line with Test HA's requirements.

**Rapid response**

All telephone calls will be answered by one of our customer service members who will allocate the job to an engineer. We note the call-out repairs hours during weekdays and weekends and confirm that we will adhere to this and all response times, including procedures for access and no access (as noted within the ITT) and where possible, we will accommodate tenant's requests for visits out-with these hours/times.

Our in-house engineers responding to a breakdown or call-out will complete a job record worksheet on their tablet. This records all pertinent information (e.g. date and time on site, nature of work carried out, hours and trades involved, etc – all as per Test HA's requirements) that is simultaneously recorded on our CLICK system database thus, allowing 'real-time' reporting to Test HA.

**Emergencies**

We will allocate our designated engineers on a daily basis, to respond to all emergency call-outs, who will comply fully with the response times against each priority coding. We note that all gas escapes and emergencies notified to us by Test HA or tenants must be responded to be in attendance and making safe within four hours. We confirm our ability to comply with this and we will always aim to make safe the situation immediately on arrival and in all cases within the four hours. Any temporary repairs will be remedied and completed in accordance with the terms of the contract.

**Ensuring safety systems of work within properties**

A risk assessment will be produced for each property to ensure safe working. All engineers also carry a mobile phone and tablet which ensures that they are contactable at all times.

*1.4 The Tenderer's proposals for co-ordinating their work to accommodate the Client's requirements for multi trade working to ensure that the works are carried out with the minimum of visits and disruption to customers. (1 x A4)*

CONTRACTOR 5 provide a dedicated operations coordinator during normal working hours, with support from 24/7-365 days a year customer service centre that is manned by our directly employed staff outwith normal working hours. Using the CLICK system to effectively schedule and manage all maintenance tasks.

All our mobile engineers are equipped with tablet technology linked directly to CLICK. This, linked with Navi (vehicle tracking system), allows our operations coordinator or customer service operatives to dispatch a call to the closest and most suitably qualified engineer or engineers. Should we receive an emergency/reactive call from the association; the coordinator/operative will take all relevant information including caller contact details, nature and location of fault.

CLICK receives 'real time' data updates from the mobile engineers ensuring our customer's access real time information through our web browser based customer portal facility. The coordinator/operative will continually be updated by the engineers as to the status of all work requests. In turn, they will continually update Test HA as new information is received.

#### **Multi trade co-ordination**

We confirm that CONTRACTOR 5 will resource this Test HA gas maintenance & servicing contract utilising our directly employed staff and multi-trade workforce, with no reliance for any subcontract companies. Therefore, all relevant trades can be allocated via CLICK and co-ordinated to ensure minimum disruption to tenants and the Test HA.

#### **Plant, machinery and spares**

All our vans are equipped with the necessary plant, equipment and spares to allow them carryout a "first time fix" to the majority of emergency repairs.

We provide our mobile engineers with the right equipment to allow them to perform their tasks with optimum efficiency. We have all the necessary plant and technical equipment in-house to deliver this contract for Test HA. Our Kilmarnock store hold a large stock of commonly used parts, in addition to the consumable items that our engineers carry in their vans, many repairs can, therefore, be made at the first time of asking. While it is not realistic to stock every part for every item of plant, we do have supply arrangements in place with most of the well-known and established suppliers and manufacturers, ensuring we have preferential supply arrangements and the best lead-times for parts that may need to be ordered directly from manufacturers.

#### **Communications**

Communication is the Test to delivering excellent contract delivery and customer service, therefore should we encounter any difficulties with completing a work request; we will update the association administrator as soon as we are aware of the problem.

Test HA will always be kept informed through to successful completion, this allows us to then make a follow up call to ensure client satisfaction.

1.5 The Tenderer's proposed approach to customer care (both to the customers and their neighbours) (2 x A4)

CONTRACTOR 5 is committed to ensuring that all tenants and Test HA receive the very highest quality service. We adopt a customer focused approach and all staff, regardless of their individual role, are recruited and trained in providing a quality-driven service, adhering to the principles that all customers and clients can expect from us. In addition to our standard company policies and procedures, relating to working in occupied properties we ensure the following behaviours are integral to all our dealings with our customers:

- Deliver our services in a professional and friendly manner
- Treat them with courtesy and respect
- Deal with all requests or queries quickly and efficiently
- Provide accurate and clear information and advice
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- Ensure security of tenants and their belongings at all times

### Customer care

CONTRACTOR 5 adopts a strong focus on customer care and satisfaction regarding our service delivery. At all times, we strive to deliver the highest level of service to achieve customer satisfaction, which meets and exceeds our customer expectations. Additionally, we want to measure and report on the level of customer satisfaction for all CONTRACTOR 5 staff as a way of continuous improvement and to provide evidence to our customers that we are delivering the best level of service for all contracts we deliver.



??? will have overall responsibility for the Test HA contract, tracking and reporting on progress of all service, maintenance and reactive works and the status of service visits. He will produce relevant reports at timeframes to be agreed, i.e. monthly. ??? will deal with customer queries and complaints, providing a central point of contact for Test HA, to enable CONTRACTOR 5 to provide first class, personal service to each Test HA property and their tenants.

### Vulnerable People

All CONTRACTOR 5 engineers are familiar working in the social housing environment and where there may be vulnerable or elderly people living/present. Our staff will always be polite, well mannered, considerate and compassionate in the households when they are carry out works under this contract. In accordance with the "Protecting Vulnerable Groups Scheme", we obtain and hold on file the Disclosure Scotland checks for all operatives who interact with members of the public either at induction, on award of new contract(s) and/or when a change is known.

Current levels are:

- Protection Vulnerable Groups Scheme (PVG)
- Basic Disclosure contains only convictions considered unspent under The Rehabilitation of Offenders Act 1974

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A password system can be put in place for more vulnerable tenants, the tenant can pick a 'password' of their choice and the coordinator will advise the engineer of this either in person or via job ticket on his tablet. The engineer can phone the tenant on his way to the job and say the password, and can also say again on arrival, this helps vulnerable or elderly people be aware they are CONTRACTOR 5 engineers attending to carry out work in their home

### **Customer complaints**

CONTRACTOR 5 is committed to providing an exceptional customer service and experience on our gas maintenance and servicing contracts. Although we always aim to provide a high quality service, occasionally there may be times when we fall short of our standards. Our complaints policy and procedure is built on the Complaint Handling Principles developed by the Scottish Public Services Ombudsman and it is our policy to ensure that any complaints received are properly investigated and given care and fair consideration. All employees are trained in customer care and are empowered to take ownership of any issues and to resolve them quickly and fairly. Where any issues/complaints cannot be resolved at site level, they will be escalated and dealt with in line with our complaints procedure and at the appropriate management level.

### **Customer Feedback**

Two-way feedback ensures that any queries and concerns can be discussed in an open forum. Issues raised can be addressed in a timely manner, ensuring continuity of service to high standards. We want to know what we do well and how we can maintain our high standards of customer care. Gaining customer feedback is paramount to ensuring that we are providing you with what you need at all times.

The aim of our monthly meetings and regular communication through telephone and/or email is to ensure that our customers know we care and feel that they have a forum with which to voice any compliments or issues or just to give us formal feedback. More importantly if there is an area where we need to improve, we can focus on this through a structured approach.

1.6 *The Tenderer's proposed procedures for quality control and their methodology to be adopted for dealing with unsatisfactory workmanship and/or materials and details of how benchmarking against KPI's and Customer Feedback (satisfaction and complaints) will be used to improve your quality of service? (3 x A4)*

CONTRACTOR 5 has the following accreditations:

- ISO 9001:2008 Quality Management System
- ISO 14001:2004 Environmental Management System
- CHAS Health & Safety Management System

Our Health, Safety, Environmental & Quality (HSEQ) policy is based on the principles of our ISO 9001 and 14001 accreditations.

We ensure compliance with all relevant legislation using a comprehensive set of documentation which we disseminate to staff via our Integrated Management Systems (IMS). Each document has been specifically designed to meet the criteria of the works being undertaken by CONTRACTOR 5 and to meet the client expectations. These are continually developed and reviewed. The policy is supported by a comprehensive IMS, consisting of policies, procedures and standard operating procedures which assist in the company meeting the objectives HSEQ legislation.

### **Quality control**

Our engineers will assess the quality of each job prior to 'signing off' as being satisfactorily completed, having followed our strict quality control procedures. Our full-time Operations Managers, responsible for the day-to-day running of the contract will be responsible for all quality related matters. He will carry out post completed quality control inspections on a minimum of 10% of the annual service inspections and also a minimum of 10% of breakdown or repairs. Hard copies of these inspections will be submitted, on a monthly basis, at our progress meetings.

Any installations or defective/dangerous appliances found to be not compliant with gas safety regulations will be shut down and made safe immediately. We will report the matter to Test HA immediately to seek instructions to proceed with remedial works whilst we are still on site. Where this is not possible, we will disconnect and seal the gas supply to the appliance, affixing the appropriate Test HA labels and advising the tenant not to use the appliance. We will report all findings to Test HA and seek further instruction on the matter. Please refer to quality control failures corrective procedures overleaf.

### **Performance Management**

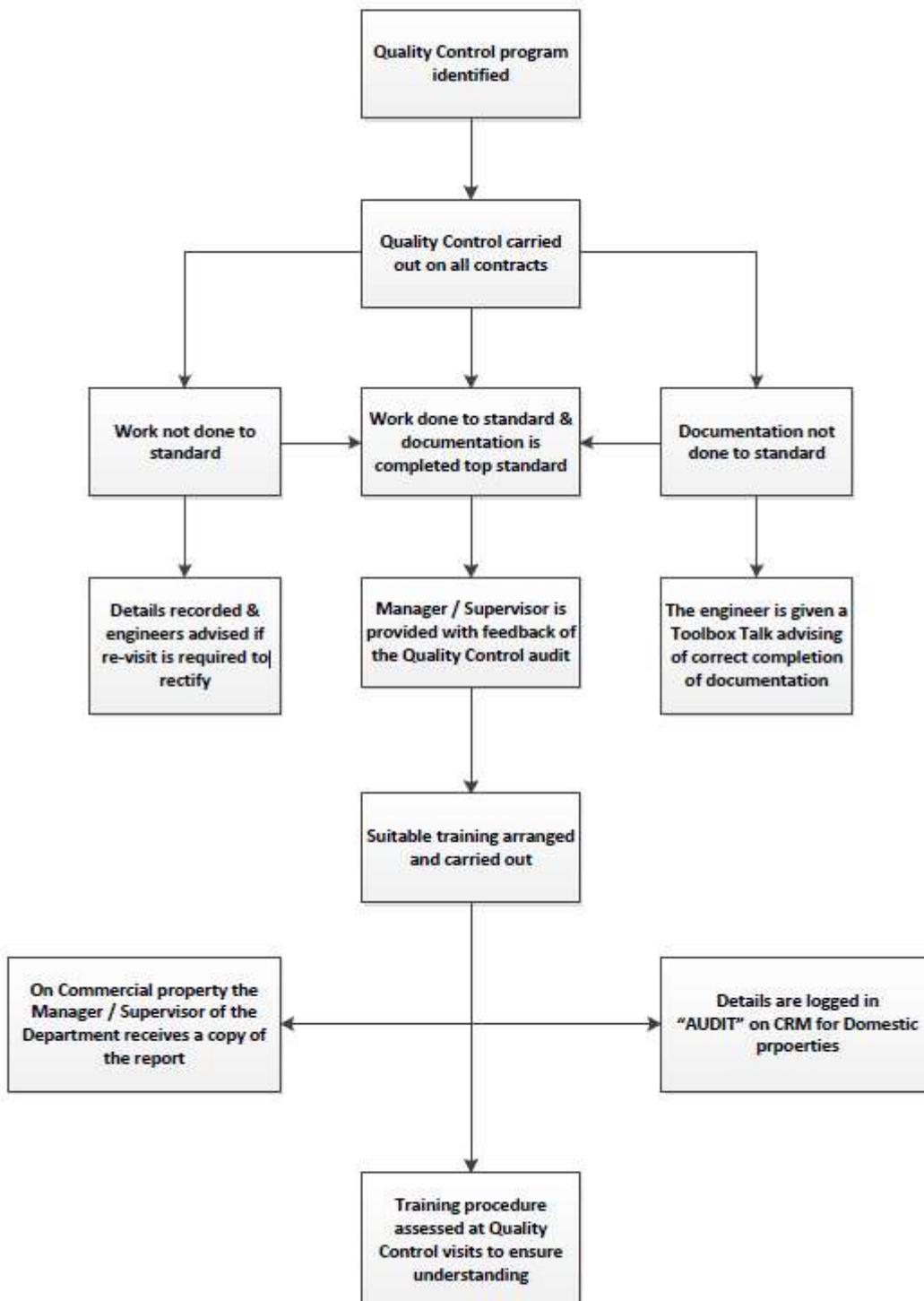
CONTRACTOR 5 will manage and report on our performance based on Test HA's aims and objectives for this contract and assessed against the agreed Test performance indicators (KPIs): quality, service, delivery and cost. We will report on our performance at scheduled performance review meetings and provide information and evidence collected during the period of review.

### **Customer feedback**

CONTRACTOR 5 also has a formal customer feedback process whereby feedback is sought against several criteria. These are analysed monthly looking for any trends and, where necessary, adjustments made to our processes.

Where our delivery falls short of customer's expectations, a customer complaint process is in place where all complaints/opportunities for improvement, are captured, investigated and tracked through to resolution to the customer's satisfaction. These are analysed for common trends. This analysis forms part of a monthly stats pack which is widely shared within the business.

## Quality Control Failures Corrective Procedures



## 2. MANAGEMENT OF THE WORKS

2.1 *The Tenderer's proposals for the office management structure for the Contract including details of the managerial methods which the Tenderer proposes to adopt in controlling and undertaking the Contract; this includes:*

- *the skills, qualifications and competence of the office staff the Tenderer proposes to use in delivering the Contract;*
- *brief details of their roles and responsibilities in the management structure;*
- *number of support staff needed. (1 x A4)*

The delivery of gas servicing and maintenance contract for Test Housing Association (Test HA) starts with Contractor 5 (CONTRACTOR 5) allocating Test HA a dedicated delivery team based out of our Kilmarnock office. The team are fully conversant with the operational environments. This dedicated operational delivery team will have full management support and necessary training to deliver all trades to the highest standards expected and we would demand on this contract, such as:

- Dedicated Operations Manager assuming management responsibility for contract and compliance
- During mobilisation period, we will carry out a review to identify if any planned maintenance tasks relating to both statutory and non-statutory maintenance are outstanding before contract commencement date
- All statutory maintenance will be recorded in a report presented to Test HA at agreed timescales.
- Maintain and regularly update the asset information for the association which will be stored on CLICK

### **???: Operations Manager**

As operations manager for housing services within the FM business unit, ??? is responsible for the successful operation and delivery of all aspects of the social housing services division, ensuring the legal, ethical and safe operation to deliver CONTRACTOR 5 requirements. He is a positive, confident, articulate and highly motivated individual with considerable experience gained within highly demanding and challenging environments with over 25 years' experience. ??? comes from a social housing plumbing/heating trades background and as such understands the issues surrounding clients, tenants, engineers and the co-ordinators and guides his team accordingly. He ensures that he team provide an excellent experience for all stakeholders.

At Director level, ??? will be support by Managing Director, ??? Lusk. ??? has over 25 years' experience in management / delivery within maintenance and will have overall responsibility for this contract. He has experience of leading and developing large FM teams across a variety of sectors improving client service delivery.

### **???: Operations Administration Manager**

Our Administration team Manager, ???, will manage and co-ordinate all administrative activities on this Test HA contract, supporting our ??? and ???. She will be support by a team of operations coordinators. ??? is an experienced operations administrator who has worked for CONTRACTOR 5 for 15 years and during this time has gained a wealth of experience in supporting numerous similar projects across Scotland.

Please refer to Test management personnel CVs appended at the rear of this document, together with an outline contract organogram.

2.2 *The Tenderers proposals for the day to day supervision of Staff undertaking the Works including details of the Tenderer's proposed supervisors who will be responsible for the day to day supervision of the Staff undertaking the Works:*

*This includes:*

- *designation; duties and responsibilities; and*
- *relevant experience and qualifications*

*(1 x A4)*

Day to day responsibly of Test HA gas servicing and maintenance contract will be delivered by ????. ??? is the Managing Director with over 30 years' experience. Over the years he has gained a wealth of knowledge and experience within the social housing sector (domestic properties). He is a self-motivated and driven person who applies a logical and methodical approach to achieving client service delivery.

His role will include:

- CLICK - is configured to allow live KPI reporting and ability to track a job through the customer journey.
- Monthly scheduled meetings – with Test HA to review performance. Attended by our BY ???, supported by the office staff as required.
- Submission of a monthly report – detailing performance by region, by work type, supported by the full list of measures completed and the performance stats for each one.
- Ensure all staff working on the contract will undergo a contract induction to ensure they fully understand the requirements of the contract

For further information please refer to ???'s CV contained in appendices at rear of document.

??? will be supported by a field based technical supervisor ??? who will support the engineers on the ground. He is an experienced supervisor and quality control engineer with over 20 years. His qualifications and training include:

- CCN1
- CPA 1
- Electrical Awareness Course
- Gas Registration Card
- Thermal Solar Training
- Safe Isolation Procedures
- Toolbox Talk Safe2Start Training
- Asbestos Awareness
- CSCS Card
- First Aid
- Values & Behaviours

Installation works will be supervised by ??? Lusk.

- 2.3 *The Tenderers proposals for the Operational Staff to be used on this Contract including:*
- *the number of Staff and their designation the Tenderer will deploy on the Works;*
  - *how such Staff are to be deployed;*
  - *whether Staff will be dedicated to this Contract or will also work on other contracts;*
  - *their competency*
- (2 x A4)

### **Delivery Team Resources**

The Test HA gas service and maintenance contract will be delivered from our Kilmarnock office; with additional support from all areas should this be required.

### **Our team**

Outlined below is our Test team members who will be available to manage and deliver this Test HA gas servicing and maintenance contract.

The dedicated engineers for the contract are who will all be dedicated 100% to the Test HA gas servicing and maintenance contract:

<b>???: Supervisor / Quality Control – Heating Engineer</b>
<p><b>Qualifications</b>          CCN1; CPA 1; Electrical Awareness Course; Gas Registration Card; Thermal Solar Training Safe Isolation Procedures; Toolbox Talk Safe2Start Training; Asbestos Awareness; CSCS Card; First Aid; Values &amp; Behaviours</p>
<b>???: Heating Engineer</b>
<p><b>Qualifications</b>          CCN1; CPA 1; CENWAT; CKR1; HTR1; DAH1; MET1; Electrical Awareness Course; Gas Registration Card; UHW; Thermal Solar Training; Safe Isolation Procedures; Toolbox Talk Safe2Start Training; CSCS Card; Asbestos Awareness; First Aid; CSCS Card; Values &amp; Behaviours</p>
<b>???: Heating Engineer</b>
<p><b>Qualifications</b>          CCN1; CENWAT; MET1; CPA 1; CKR1; Gas Registration Card; HTR1; UHW; MET1; Thermal Solar Training; Asbestos Awareness; Toolbox Talk Safe2Start Training; Working from Portable Ladders; CSCS Card; Values &amp; Behaviours</p>

### **Support**

The Test engineers outlined above will be support by 10+ heating engineers based in Central & Southern Scotland, with further supported available in a variety of trades.

### **Work stability**

CONTRACTOR 5 has a very low turnover of staff (approx. 3.5%). Many of our engineers have over 20 years of employment within the company and a wealth of experience in service, maintenance and installations.

### **Training and development**

Our commitment to continuous improvement and lifelong learning means that, regardless of their experience and qualifications, all employees are expected to continually develop their competence through a mix of CPD training, on-the-job learning, instruction/supervision, assessment and formal qualification. Regular role and project specific training, as well as health and safety training, is delivered throughout their employment to ensure their competence and that they remain up-to-date and compliant with all relevant statutory regulations, industry best practice and company policies and procedures. All employees are provided with a trade specific Employee Handbook which contains our policies and procedures and other relevant company information. All training is provided in the form of toolbox talks, refresher training, technical bulletin updates, internal and external training sessions on various topics and site-specific H&S related issues.

### **Vans/Vehicles and stocks**

All engineers are allocated a company van with the necessary tools and equipment necessary to allow them to perform their role fully. Van stocks will be tailored to suite the specific requirements of the installed assets under this Test HA contract. All our vans are equipped with the necessary plant, equipment and spares to allow them carryout a “first time fix”, or at the very minimum max safe, to the majority of emergency repairs (within the 4 hours stipulated). We will regularly review our materials requirements, any trends in usage, etc. to ensure there are no supply issues and that van stocks can be replenished daily. It is the responsibility of each engineer to ensure they have the tools for the works involved and to replenish their van stock as necessary; parts/materials, spares, tools and emergency kit, first aid, fire-fighting equipment, etc. Our engineers can use their tablets to access all manufacturers part lists, allowing them to identify and source the correct components directly whilst on site.

### *Tools & Test Equipment*

CONTRACTOR 5 allocates every engineer with the following tools and test equipment:

- Tightness Test Equipment including digital gauge and/or water manometers
- Flue gas analyser
- Electrical Multi-meter
- Stopwatch
- Smoke matches & pellets
- Leak detection fluid
- Temporary continuity bond
- Personal electrical lock out kit
- Voltage indicator
- Vacuum cleaner
- Electronic gas detector

### *Typical Spares*

A typical list of day to day spares will include:

- Personal Protective Equipment
- Pumps
- Thermostats
- Motorised Values
- 3A Fuses
- Printed Circuit Boards
- Fans
- Vessels
- Mechanical seals
- Gas burners
- Oils and greases
- Cleaning Materials

#### 2.4 The Tenderer's proposals for managing the Works in respect of:

- the level of operational resources (systems and equipment) which the Tenderer considers will be required to effectively carry out the Works under the Contract most effectively;
- proposals for dealing with personal data in accordance with the Data Protection Act 1998;
- submission of testing certificates (2 x A4)

CONTRACTOR 5 view contract mobilisation as the first Test stage, allowing Test aspects of the contract to be set up accurately and any Test objectives and challenges communicated. We are firmly of the belief that a well set up contract is highly likely to meet Test HA's expectations.

#### **Mobilisation**

At pre-mobilisation stage a contract mobilisation plan will be developed and agreed with Test HA, the plan will include, but will not be limited to

- Identify Test deliverables of the contract and how they will be achieved
- Set in place management and administration resource and brief on contract specifics
- Provide full contract information pack to management and administration
- Management and administration to set up CLICK system including
  - Sites
  - Assets (may be subject to asset verification)
  - Service planned preventative maintenance (PPM) specification
  - Reactive works contract nominated authorisation levels
  - SLA's and KPI's agreed
  - Resource allocation – Test engineers identified
  - Specific property access details or instructions
  - Property Health and Safety information (including asbestos information)
  - Contract portal set up
- Arrange asset collection / verification (if required)
- Identify and brief engineering resource
  - Scope of services
  - Property access and any contract instructions
  - Health and Safety
  - Waste Management and contract specific instructions
- Identify if any contract backlog PPM to be scheduled
- Identify with Test HA if any maintenance requires attention
- Agree contract report format and timetable
- Agree contract meeting format and timetable
- Hold pre-start meetings as required

#### **Contract Management**

At the contract start date the operations team continue with their involvement, this ensures a consistency of personnel and management of actions. This also ensures the following Test actions are monitored and delivered:

- Operations manager will have an extensive site presence and be fully available for any immediate questions / issues raised
- Property audits (as per our quality procedures) and visits to be carried out in the first week to ensure engineers and sub contractors achieve objectives

Engineers will be tasked on a job by job basis via our CLICK system and tablet solution which allows tracking of the following from day one

- PPM visit status
- Reactive works status
- Completed work record sheets
- Certification

Weekly post start contract meeting/s to include but not be limited to

- Asset clarity and any actions required
- Backlog PPM – up to date situation
- CLICK reports on PPM progress and any outstanding
- CLICK reports on reactive progress and any outstanding
- Any site health and safety issues raised

## **CLICK System**

We have developed a live web portal facility, Computer Aided Facilities Management (CLICK) System, which allows our customers to securely view a range of data relating to their contract work. We believe this offers huge benefits to our customer base and shows our willingness and commitment to operate in a fully transparent manner.

As part of our standard reporting set, the following reports are currently available from our CLICK system;

- Number of planned preventative maintenance tasks scheduled in the period
- Number of planned preventative maintenance tasks completed in the period
- Number of planned preventative maintenance tasks incomplete / concessions
- Number of defects reported
- Number of defects reported on assets under warranty
- Quality control status
- Report on quoted works (small works / project works / Capital works)
- Report on customer satisfaction

The reports will be automated from an SQL server report on the day and at the time requested by Test HA. The Reports can be issued on CD, by email or they can be made available through our web based browser customer login. Reports can be provided in various formats including, PDF, Excel, CSV, XML, TIFF and Word.

## **Data Protection**

CONTRACTOR 5 has strict policies and procedures for working in and around occupied properties and all our operatives will undergo customer care training which ensures that they adhere to our "Code of Conduct". This sets out the minimum standards of behaviour that we expect from our employees which is also in line with our clients' Code of Conduct for Contractors. This means they are respectful of residents and their property, they will protect their home and belongings in accordance with our practical measures guidelines (e.g. using clean dust sheets) and they will ensure the safety and security of the residents at all times (e.g. through risk assessments carried out at the property and paying particular attention to vulnerable residents who may be elderly, infirm or those with young children, etc. We also take consideration of the new GPDR regulations due to come into force in May 2018, this includes all applicable laws and regulations relating to processing of personal data and privacy, including where applicable the guidance and codes of practice issued by the Information Commissioner.

## **Gas Safety Certificates (CP12s)**

All CP12s will be done on company issue tablets, 100% Quality Control checked then released on to the client CLICK portal which can be accessed by Test HA officers via a secure web browser. Hard copies or electronic copies can also be issued to Test HA should that be the preference.

2.5 *Describe how you will commit to fair work practices for workers (including any agency or subcontractor workers) engaged in the delivery of this contract. (1 x A4)*

As an organisation who works for The Public Sector in Scotland we are committed to the delivery of high quality services, and we have for a long time recognised that we are dependent on our workforce. As an Equal Opportunities employer we ensure that our staff are recognised, fairly rewarded, motivated, engaged, provided with training opportunities and skills development, including re-skilling and up-skilling. As such we adopt the fair work practices, as outlined in the new Statutory Guidance on the Selection of Tenderers and Award of Contracts Addressing Fair Work Practices, including the Living Wage, in Procurement, published in October 2015. Our commitment is detailed below

- As an Equal Opportunities employer we fully promoting equality of opportunity and developing our workforce which reflects the population of Scotland in terms of characteristics such as individuality such as race, colour, ethnic or national origin, gender, marital status, disability, religion, sexual orientation, age, responsibilities for dependants,
- We pay our employees a fair and equal pay irrespective of individuality such as race, colour, ethnic or national origin, gender, marital status, disability, religion, sexual orientation, age, responsibilities for dependants. We pay our operatives at least the Living Wage and we are working to become a Living Wage Accredited Employer,
- We undertake and complete Annual Appraisals with all staff, we have a training and Development Policy and we take our responsibility to foster talent and ensure that we help all staff fulfil their potential,
- We have a Modern Apprenticeship Programme to develop skill in-house. We are working in Partnership with local Colleges to provide a SVQ courses. We currently have 2 trainee/apprentices one of which is an adult and working in our re-skilling programme. All of our trainee/apprentices are part funded by European Grants,
- We provide all our employees with a fully or part-time contract, the conditions and hours of working are the same (pro-rata on part-time staff). We do not use exploitative employment practices such as zero-hour contracts,
- As a modern and flexible employer we embrace the use of flexible working. We have flexible starting and finishing times and hours can be adjusted if time is required for family or personal reasons and we have provided arrangements around career breaks and would do again. We promote the culture of a work life balance and support for family friendly working to this end,
- We fully support progressive workforce engagement, we have a cross departmental working forum that meets quarterly and all departments have at least one representative to give staff and effective voice,
- Our staff are free to choose if they wish to join and have arrangements in place to ensure trade union representation where possible.

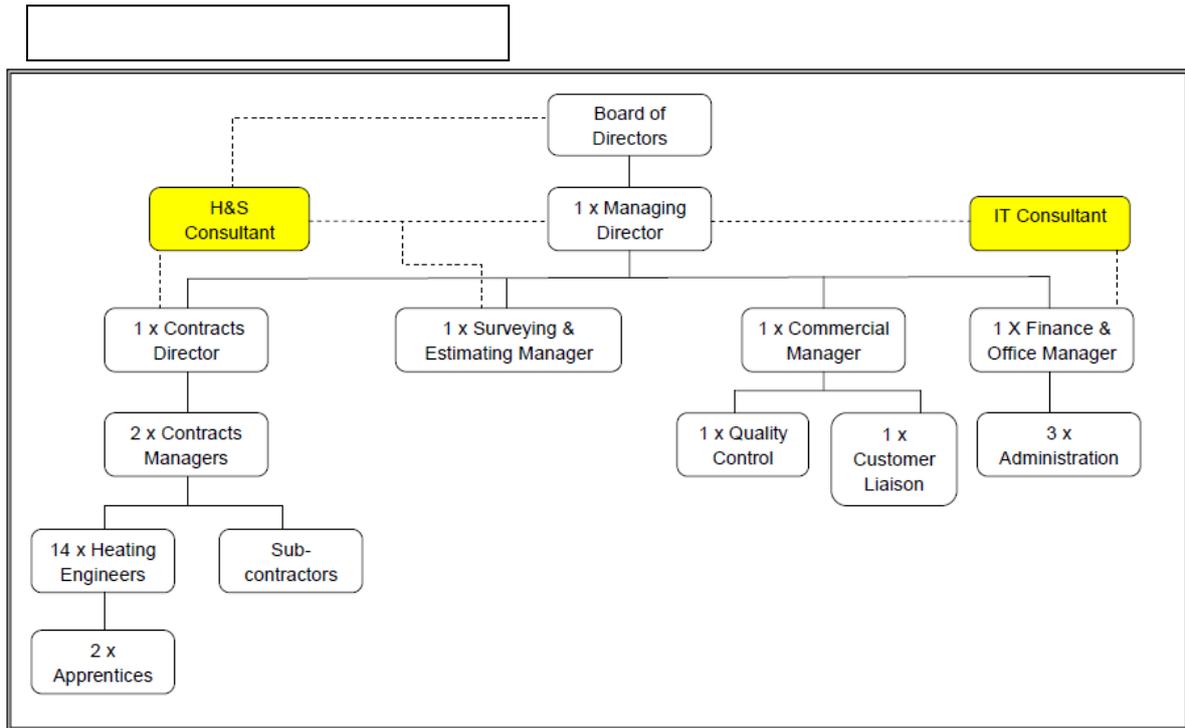
We only employ highly experienced, trained and motivated people to resource projects such as this under the management of the Contracts Manager and Supervisor assigned to the project. In addition we will provide parallel support from the administration and compliance teams from our Technical support network.

### **Performance Management**

CONTRACTOR 5 will manage and report on our performance based on Test HA's aims and objectives for this contract and assessed against the agreed Test performance indicators (KPIs): quality, service, delivery and cost. We will report on our performance at scheduled performance review meetings and provide information and evidence collected during the period of review.

APPENDIX 2.1

ORGANOGRAM AND TEST OFFICE OPERATIVE CVS



### ??? Lusk, Managing Director

??? is Managing Director of the CONTRACTOR 5. He has over 30 years' experience and an unrivalled knowledge of the industry, with particular skills in developing and maintaining customer relations.

#### Role on Test Housing Association contract

Managing Director overseeing performance review and ensuring Test objectives and community benefits are met.

#### Qualifications and Training

- Level 6 Construction Management, Gas and Plumbing Qualifications
- CCN1
- CPA1
- CENWAT
- CKR1
- HTR1
- Water Byelaws 30
- SMSTS
- UHW
- Asbestos Awareness
- First Aid
- Toolbox Talk Safe2Start Training

#### Test Skills

- Experience of leading and developing large Teams
- Wide industry experience of improving client service delivery
- Structure and delivery team adaptation to improving client experience
- Strategic development of new divisions and teams to allow enhanced self delivery
- Wide experience of adapting / developing business delivery structures and teams

## ???: Operations Administration Manager

??? is an experienced operations administrator who has worked for CONTRACTOR 5 for 15 years and during this time has gained a wealth of experience in supporting numerous similar projects across Scotland. She, will manage and co-ordinate all administrative activities on this Test HA contract, supporting our ??? & ???. She will be support by a team of operations coordinators.

### Role on Test Housing Association contract

Office administration including CLICK systems and management of 24/7 customer service team.

### Qualifications and Training

- HND in office administration
- Manager Toolkit Training
- CLICK

### Test Skills

- Daily call handling of tenant enquiries and call off orders from Test HA by our Helpdesk Team;
- Ensuring all call-off jobs are planned and allocated using the CLICK work planner/scheduling facility;
- Ensuring the Navi (vehicle tracking facility), mobile phones and tablets are operational and any issues are brought to the attention of the Manager;
- Ensuring parts required are ordered and received within the required timeframes;
- Working closely with the Manager to ensure resources are available to undertake the works.

**???: Operations Manager**

??? is a positive, confident, articulate and highly motivated individual with considerable experience gained within highly demanding and challenging environments with over 25 years' experience. ??? comes from a social housing plumbing/heating trades background and as such understands the issues surrounding clients, tenants, engineers and the co-ordinators and guides his team accordingly. He ensures that he team provide an excellent experience for all stakeholders.

Over the years he has gained a wealth of knowledge and experience within the social housing sector (domestic properties) having previously worked for ?? Council, ??? and CONTRACTOR 5. ???'s role will encompass the establishment of consistent service delivery, on-going management of a high performing contract team, sharing knowledge and best practice from our corporate experience and continuous contract improvement.

**Role on Test Housing Association contract**

??? will have the overall account management responsibility for the Test HA contract.

**Qualifications and Training**

- Level 6 Construction Management, Gas and Plumbing Qualifications
- CCN1
- CPA1
- CENWAT
- CKR1
- HTR1
- Water Byelaws 30
- SMSTS
- UHW
- Asbestos Awareness
- First Aid
- Toolbox Talk Safe2Start Training

**Test Skills**

- Commercially aware
- Technically skilled
- Excellent man management and communication skills
- A natural team leader
- Comfortable in a changing environment with a supportive, inspiring style to communicate and achieve set goals through the development of the internal and external team
- Positive and conscientious approach
- Account management & building client relationships

## ???: Supervisor / Quality Control – Heating Engineer

??? is a Supervisor / Quality Control within CONTRACTOR 5 with over 20 years' experience. Over the years he has gained a wealth of knowledge and experience within the social housing sector (domestic properties). He is a self-motivated and driven person who applies a logical and methodical approach to achieving client service delivery.

### Role on Test Housing Association contract

- Dedicated Supervisor / Quality Control assuming management responsibility for contract and compliance.
- During mobilisation period we will carry out a review to identify if any planned maintenance tasks relating to both statutory and non-statutory maintenance are outstanding before contract commencement date
- All statutory maintenance will be recorded in a report presented to Test HA.
- Maintain and regularly update the asset information for Test HA which will be stored on our CLICK system.

### Qualifications and Training

- DHPS
- Electrical Awareness Course
- Gas Registration Card
- CCN1
- CENWAT
- CKR1
- HTR1
- UHW
- PART L
- WB2014
- STHWS
- Asbestos Awareness
- Safe Isolation Procedures
- Toolbox Talk Safe2Start Training
- COSSH Awareness Toolbox Talk
- Values & Behaviours

### Test Skills

- Excellent interpersonal skills
- Self-reliant
- Loyal and a determined team players
- Well organised individual who is adaptable and flexible
- A good negotiator and can always see ways to get the best out of peoples situations