

28th June 2018

Dear Sir / Madam,

Contract Title: Asbestos Surveying and Retained Advice

Tender Reference: ASBKC18

Stockport Homes (SHG) invites you to submit a tender in accordance with the attached tender documentation consisting of the following:

Tender Documentation	Section title
Part 1	Invitation to Tender
Part 2	Conditions of Tender
Part 3	Conditions of Contract
Part 4	Background to Stockport Homes
Part 5	Specification
Part 6	Tender Response Document
Part 7	Form of Tender
Part 8	Form for Non Canvassing
Appendix number	Title of Appendix
1	Pricing Schedule
2	Tender Response Questionnaire
3	Social Value Minimum Requirement
4	Social Value Tender Response Questionnaire
5	Social Value Supplier Guide
6	Social Value Supplier Guide – Supplementary

All Tenders must be submitted in accordance with the instructions and requirements set out in the Tender documentation. Failure to comply with these instructions will result in your Tender being rejected.

The appointment will be for an initial period of 3 years from the date of award of the Contract, subject to satisfactory performance, with a possible one year extension on agreement between the parties.

The closing date for return of Tenders is Thursday 2nd August 2018, 12.00 noon. Tenders should be returned to: procurementshl@stockporthomes.org. Under no circumstances will late Tenders be considered.

All requests for clarification or questions relating to the tender process should be communicated to:

Kate Crowther
Facilities Maintenance Manager
07976 241 724
kate.crowther@stockporthomes.org

Interviews may be conducted to gain understanding and clarification of tenders, if you are to be invited to interview you will be contacted by Wednesday 29th August 2018. Please note that interviews will be held on week beginning 3rd September 2018.

SHG is not obliged to accept the lowest or any tender.

Yours sincerely



Kate Crowther
Facilities Maintenance Manager



Proud to be part of **SHG**

TENDER DOCUMENTATION

TENDER FOR THE SUPPLY OF
Asbestos Surveying and Retained Advice

TENDER REFERENCE NUMBER: ASBKC18

CLOSING DATE FOR SUBMISSION OF TENDER APPLICATIONS

Thursday 2nd August 2018, 12.00 noon

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PART 1 – INVITATION TO TENDER

- 1.0 Stockport Homes Group (SHG) invites competitively tendered offers in accordance with the attached Tender documents.
- 1.1 Tenderers are advised to read this Invitation to Tender and all supporting documentation very carefully to ensure they are familiar with the nature and extent of the obligations to be accepted by them if their tender is successful.
- 1.2 SHG does not bind themselves to accept the lowest, or any offer and receives the right to cancel the procurement process at any time.
- 1.3 SHG will not be responsible for, or pay any expenses incurred by the Tenderer in preparation of this tender.
- 1.4 Any apparent ambiguities, errors, or omissions in the tender documents should be notified to SHG's Procurement Officer without delay, please mark emails F.A.O The Procurement Officer and send to procurementshl@stockporthomes.org
- 1.5 It is the sole responsibility of the Tenderer to ensure their tender is received in time, and to register for any relevant procurement portals in advance. Tenders received after the closing date will not be accepted.
- 1.6 Completed tenders are to be returned by email to procurementshl@stockporthomes.org. Tenders submitted by other means will not be accepted.
- 1.7 Clarification questions relating to this tender must be emailed to kate.crowther@stockporthomes.org. The deadline for receipt of clarification question is 7 calendar days before the tender return deadline. Responses given to clarification questions will be shared with all tenderers, unless you expressly require it to be kept confidential at the time the request is made. Should SHG decide the contents of the request are not confidential you will be given the opportunity to withdraw your clarification request.
- 1.8 All submissions must be in the English Language and priced in Sterling, exclusive of VAT.
- 1.9 The deadline for the return of completed tenders is Thursday 2nd August 2018.
- 1.10 Tenders must be accompanied by:
 - A signed form of offer (Part 7 of ITT)
 - A signed Non Canvassing Form (Part 8 of ITT)
 - A signed completed Tender Response Questionnaire (Appendix 2)
 - Completed Pricing Schedule (Appendix 1)
 - Copies of the mandatory documents requested (see section 5.3 of the specification document)
 - Completed copy of the Social Value Minimum Requirement document (Appendix 3)
 - Completed copy of Social Value Tender Response Questionnaire (Appendix 4)

PART 2 – CONDITIONS OF TENDER

Period of Validity

2.1 The tender shall be open to acceptance by SHG for a period of six months.

Confidentiality

2.2 Tenderers must treat the tender documents and all details contained within, as private and confidential.

2.3 This invitation and its accompanying documents shall remain the property of SHG and must be returned on demand.

Freedom of Information Act 2000 (FOIA)

2.4 SHG is subject to the Freedom of Information Act 2000 (FOIA) and the Environmental Information Regulations 2004 (EIR).

2.5 As part of SHG's obligations under FOIA and / or EIR, it may be required to disclose information concerning the procurement process or the contract to anyone who makes a reasonable and valid request.

2.6 If tenderers consider that any of the information provided in their tender is commercially sensitive (meaning it could reasonably cause prejudice to the organisation if disclosed to a third party) then it should be clearly marked as "not for disclosure to third parties" together with valid reasons in support of the information being exempt from disclosure under FOIA and / or EIR.

2.7 Should an information request be received, SHG will endeavour to consult with tenderers and have regard to comments and any objections before it releases any information to a third party under FOIA and / or EIR. However, SHG shall be entitled to determine in its absolute discretion whether any information is exempt from disclosure, or if it is to be disclosed in response to a request for information.

2.8 SHG will make its decision on disclosure in accordance with the provisions of FOIA and / or EIR and can only withhold information if it is covered by an exemption from disclosure under FOIA and or EIR.

2.9 SHG will not be held liable for any loss or prejudice caused by disclosure of information that:

- Has not clearly been marked as "not for disclosure to third parties" along with supporting reasons or
- Does not fall into a category of information that is exempt from disclosure under FOIA and / or EIR or
- In cases where there is no absolute statutory duty to withhold information, then notwithstanding the previous clauses, in circumstances where it is in the public interest to disclose any such information.

Insurance

2.10 The successful Tenderer(s) must hold as a minimum the following insurances, throughout the duration of the contract period:

Product Liability - £5 million

Public liability - £5 million

Employer's Liability Insurance - £10 million

Assumptions

2.11 Tenderers must not make assumptions that SHG has experience of their organisation or their service provision even if on a current or previous contract. Tenders will only be evaluated on their information provided in their response.

Contract Monitoring, Performance Indicators and Key Performance Indicators (KPIs)

2.11 SHG is committed to helping improve the efficiency of contracted suppliers through sharing information on performance measurement. The final criteria for measuring performance shall be agreed with the successful supplier and formally documented.

For the avoidance of doubt, SHL is not committed to ordering any minimum volumes of service under this agreement, and shall be free to independently source any services from any other provider they see fit, should the successful Tenderer fail to meet SHL's requirements.

Quantities Stated

2.12 Tenderers should note that where quantities are given in this specification they are estimates only and are not be binding on SHG.

Award Criteria

2.13 The Contract shall be awarded on the basis of the most economically advantageous tender (MEAT), using the criteria as outlined in this document.

2.14 SHG is not bound to accept the lowest or any offer.

2.15 The successful offer including any post tender clarification, together with SHG's written acceptance, and the acceptance of the JCT Measured Term Contract will form part a binding contract between SHG and the successful tenderer.

Price

2.16 Prices must be stated in the Price Schedule (as detailed at Appendix 1) and must remain open for acceptance until six months from the closing date for receipt of tenders.

Bidding organisations are instructed to price for items in the Price Schedule to include for **any and all costs** associated with delivery of the specified services within this contract. This shall include, but is not limited to, all preparation, planning, mobilisation, delivery, reporting, management, travel, subsistence, tools, sundry items, access and equipment costs that may be incurred in the delivery of the specified services.

No additional costs shall be paid outside of the items allowed in pricing schedule (Appendix 1)

All prices will be fixed for the contract duration.

All costs quoted shall be exclusive of VAT.

All itemised elements must receive an allocated cost. Grouped costing will not be accepted and will lead to disqualification of the bid.

If SHG considers that a Pricing Schedule submitted by a Tenderer is abnormally low SHG may request a written explanation. SHG will take into account any explanation which justifies the Pricing Schedule. If, after considering any explanation, SHG, acting reasonably, still considers that the Pricing Schedule is unjustifiable or otherwise abnormally low SHG will verify with the Tenderer that the Pricing Schedule (or part of it) is abnormally low and may reject the Tender in its entirety. In the absence of manifest error the Tenderer will not be able to alter the Pricing Schedule once submitted and this paragraph should not be viewed by any Tenderer as an opportunity to do so.

Interviews

2.17 Interviews may be conducted to gain understanding and clarification of tenders. It is not envisaged that every tenderer will, necessarily, be invited to interview. The procedure for interviews will be advised when required.

References

2.18 The tenderers should note that before, during and after the tendering procedure, should adverse references be received, the Employer reserves the right not to enter into the Contract. The Employer is not restricted to referees put forward by tenderers.

Tender Assessment

2.19 The submissions will be evaluated on the basis of 30% price and 70% quality

The quality assessment questions will be marked out of 5 and scored based on a percentage % weighting allocated to each question, with 70% being the maximum quality score. Quality assessment questions are set out in the Tender Response Questionnaire.

Tenders will be assessed by an Assessment Panel consisting of relevantly experienced members of SHG staff. Members of the Assessment Panel will independently award marks for each of the tender responses provided, and then meet to award a collective score based against an award criteria.

Details of the scores given for each of the areas assessed will be fully recorded and will be communicated to tenderers before the award of the contract.

Tenderers should also note that there is a minimum quality threshold of 55% of the total available quality score. Where a tender does not meet this minimum requirement, the tender will be discounted from further consideration.

TUPE (Transfer of Undertakings (Protection of Employment) Regulations 1981.

2.20 Asbestos surveys are not currently routinely carried out under contract by another contractor and therefore there will be no TUPE transfer of staff from any existing incumbent contractors.

Social Value

2.21 We are committed to acting in a socially responsible way, and will seek to influence our contractors and partners to do the same. In accordance with the Social Value Act 2012, we will consider how the services we commission and procure might improve the economic, social and environmental well being of the area. This will ensure that we are directing our purchasing power towards transforming people's lives and improving local communities wherever possible.

Living Wage

2.22 SHG is a Living Wage employer, which means we are committed to paying all our staff the Living Wage. SHG encourages its suppliers to pay their own direct employees the Living Wage.

Modern Slavery Act

2.23 The Modern Slavery Act 2015 aims to eradicate Modern Slavery, including human trafficking, child labour, forced labour and servitude. SHG supports the principal of the act in eradicating modern slavery and seeks assurance from suppliers of their commitment to the Act.

Canvassing

2.24 Any tenderer who directly or indirectly canvasses any Member of SHG concerning the award of the contract is likely to be disqualified.

PART 3 – CONDITIONS OF CONTRACT

3.1 The form of contract will be a JCT Measured Term Contract.

Period of Contract

3.2 It is anticipated that this contract shall commence on 1st October 2018 and run for a period of 3 years with a potential extension period of 1 year

The decision as to whether to extend the Contract by 1 year will be based on the following criteria:

- i) Meeting all key performance indicators (see section 5.18 of specification)
- ii) Ability to demonstrate comparable value with best in sector;
- iii) Demonstration of innovation, value engineering and commitment to values;

Contract Management

3.3 The Contract Manager for this contract is Mark Harrington.

3.4 The successful Tenderer shall provide SHG with a designated point of contact for the duration of the contract. The designated contact shall be responsible for the execution and management of this contract and will liaise with SHG as required.

Contract Performance Review

3.5 The contract performance will be reviewed regularly, at a frequency set by SHG. This is likely to be more frequent in the first few months of delivery of the services. Successful tenderers are therefore required to ensure their full co-operation with SHG.

Financial Management – Orders and Payment

3.6 SHG shall pay correctly addressed and undisputed invoices within 30 days

3.7 Invoices are to be sent to asbestos@stockporthomes.org and must be received within 6 weeks of job completion.

Subcontractors / Suppliers

- 3.7 Sub-contracting any part(s) of the work or using staff not directly employed by the organisation shall be prohibited, without prior agreement and authorisation from SHG. Database and PDA support is excluded from this statement.

Non-Compliant / Incomplete Tenders

- 3.8 Tenders may be rejected if the complete information called for is not given at the time of tendering or if the tender submission fails to comply with the format and presentation as instructed in this ITT document.

Acceptance of Tender Submissions and standstill period

- 3.9 SHG will in accordance with Regulation 86 of the Public Contracts Regulations observe a 10 day “standstill” period between the intention to award a contract and entering into a contract with the successful supplier. At the start of the period each tenderer who has submitted a tender will be sent a letter stating:
- the criteria for the award of the contract
 - the reasons for the decision including
 - the name of the successful supplier
 - their score and the score of the successful supplier
 - the “characteristics and relative advantages” of the successful tender compared to their tender.

PART 4 – BACKGROUND TO STOCKPORT HOMES

4.0 About Stockport Homes

Stockport Homes was formed in 2005 to manage housing stock across Stockport on behalf of Stockport Council. As a limited company we operate as an ALMO (Arms Length Management Organisation), so whilst the company is owned by the Council, we operate independently on day to day matters and delivering services to our customers. We currently manage 11,500 properties across the Borough, a mixture of individual domestic dwellings, cottage flats, low, medium and high rise blocks and also hostels. SHG also deliver services to 60 local schools and care homes.

During 2016 we extended our services, through a new trading company “Three Sixty” and a development company “Viaduct”, the new companies mark an exciting period of growth for us along with bringing in new staff members and services under the Stockport Homes Group (SHG) Umbrella.

The asbestos surveying function has previously been delivered by a SHG in house asbestos surveyor, SHG however now wish to out source this function.

4.1 The ASPIRE Culture

The SHG ASPIRE culture makes sure we are delivering the services needed by our customers:

Ambition: we have the ambition and courage to challenge, translating this into commercial success and brilliant outcomes for customers.

Social Responsibility: We always try to do the right thing; using our role as a service provider, employer and buyer to generate trust, build our communities and empower our people.

Passion: we have a passion for what we do, with positive, motivated and enthusiastic staff who enjoy their work.

Innovation: we are innovative in everything we do, with the agility, creativity and edge to keep defying expectations and deliver fresh and exciting things.

Respect: we treat each other with respect; supporting and inspiring one another and collaborating across teams and partnerships.

Excellence: we continually improve how we work; challenging the status quo, learning from what goes well and always being professional.

4.2 Mission Statement

One Team Transforming lives

4.3 Aims

SHG Aims:

- Be a great place to work

- Be accountable to customers
- Maximise efficiency
- Reduce inequalities
- Build strong collaborative relationships locally, regionally and nationally
- Improve the Environment

Stockport Homes Aims:

- Engage customers and communities
- Provide comfortable, affordable homes
- Deliver thriving, safe and sustainable neighbourhoods
- Support the council to meet its aims in Stockport

PART 5 – SPECIFICATION

5.1 NATURE/SCOPE OF CONTRACT

5.1.1 The contract being bided is for a period of 3 years with an option to extend for a further 1 year.

5.1.2 The Contract is designed to deliver:

- Asbestos Management Surveys to residential dwellings (tenanted and void) and non domestic areas of communal blocks, garages and community centres.
- Bulk Sample Analysis (both planned and reactive in the event of emergency)
- Targeted Asbestos Refurbishment and Demolition and Hybrid Surveys
- ACM Re-inspection surveys of previously identified, presumed and sampled ACMs to non domestic areas of communal blocks, schools, garages and community centres.
- Reassurance air monitoring
- 4 stage clearance
- Asbestos Awareness Training
- Project management services
- Management of asbestos data and provision of an online portal
- 24 hours, 7 days a week emergency response for sampling, analysis and guidance.
- Independent audits of asbestos removal contractors to ensure they are complying with legislation and guidance.
- Advice on actions required by SHG to comply with any changes in Regulations, or prevailing HSE guidance throughout the contract term.

Note – All of the above are mandatory elements of the contract and therefore bidders should not submit a bid unless they are able to deliver all elements of the works required

5.1.3 The properties to be covered in this contract include sheltered housing schemes, residential multi story blocks, residential, schools, care homes, offices and community centres. All properties are within or around the Stockport borough area, but this could increase to surrounding boroughs (e.g. Tameside, Trafford and Greater Manchester)

5.2 VOLUME OF WORK

5.2.1 The anticipated contract value cannot accurately be predicted. The amount of work ordered in any one year will be dependant on a number of factors such budget, tenancy changes, reactive repair activity, SLAs with commercial partners and the nature and volume of planned work programmes.

The Contractor must be in a position to cope adequately with fluctuations in demand and to adhere to the strict timescales and sequence of surveys required. The Contract Manager (CM) will endeavour to provide the contractor with sufficient notice of any significant changes in demand.

5.2.2 The intention is to complete comprehensive management surveys to 100% of SHG's individual domestic units (houses, bedsits, flats, bungalows and maisonettes) over the first 2 years of the contract, this will be done through a number of workstream – voids, planned surveys and hybrid surveying ahead of refurbishment works. It is anticipated this equates to approximately 11,000 domestic surveys.

5.2.3 All communal areas (internal and external non-domestic areas), have been inspected

previously with approximately 40 blocks having new management surveys carried out in the last 12 months. These will require cyclical re-inspection and incorporation of survey data within the Contractors new register system.

5.2.4 There are approximately 550 other blocks where asbestos has been previously identified and it is SHG intention to instruct the winning bidder to carry out new management surveys to these blocks over the first 2 years of the contract, the exact programme will be discussed upon award and is dependent on budget. It should be noted that these 550 blocks are a mixture of cottage flats, low and medium rise. All high rise blocks already have a new management survey.

5.2.5 Detailed below is **indicative** volumes of work during the **1st year** of the contract:

- Asbestos Management Survey to void properties (all internal & external accessible areas) – 15-20 per week
- Programmed Asbestos Management Survey to tenanted property (all internal & external accessible areas) – 4500 over the year
- Programmed Asbestos Management Survey to tenanted properties (all internal & external accessible areas) plus refurbishment survey to 2 areas – 600 over the year
- Asbestos Management Survey to void and non programmed properties (all internal & external accessible areas) plus refurbishment survey to 2 areas – 300 over the year
- Asbestos Management Survey to a block (communal areas only) – 20 per month
- Asbestos Refurbishment Survey to a block (2 areas on average) – 10 over the year
- Asbestos Refurbishment Survey to property roof and/or roofline – 250 over the year
- ACM Re-inspections survey in blocks (5 items on average) – 5 per month
- ACM Re-inspection survey in Schools (20 items on average) – 2 per month
- Emergency bulk Samples and analysis (within working hours) – 4 per week
- Emergency bulk Samples and analysis (outside working hours) – on average less than 1 a week
- Reassurance air monitoring and 4 stage clearance – equivalent of 7 full days a month

5.2.6 To ensure access to all areas school re-inspections will likely need to be arranged for during school holidays and therefore the Contractor will need to be able to accommodate for spikes in demand at certain times of the year.

5.2.7 The Contractor will receive a programme of anticipated surveys required for the forthcoming year which SHG will endeavour to provide in manageable lots in sequential order. The completion dates will be agreed on an order by order basis with the CM. The Contractor is

to provide a programme for each order by properly identifying commencement and completion dates and progress will be discussed at contract meetings.

5.2.8 No instructions are to be taken from the resident regarding the extent of the survey to be undertaken.

5.2.9 The CM reserves the right to withdraw an order or property when required. No charge shall be made by the Contractor if an order is withdrawn before work is commenced.

5.3 MANDATORY SUBMISSIONS

In addition to the pricing and quality submissions the bidding organisations are required to submit additional supporting information and evidence.

Please note that failure to supply the required supporting information may result in disqualification from the bidding process.

Please provide the following:

- A copy of your company's Health and Safety Policy
- A copy of your site emergency procedures
- Accident statistics for your organisation for the last 3 years and details of any enforcement notices/prosecutions in the last 5 years.
- A copy of your current employers liability
- A copy of your current public liability (detailing the range of services covered by your insurance policies).
- Copies of accreditations:
 - ISO 9001
 - ISO 14001
 - OSHAS 18001
 - UKAS ISO 17020
 - UKAS ISO 17025.
- Evidence of registration with CHAS or SSIPS certification
- Evidence of registration with Constructionline
- Evidence of Membership of:
 - ATaC
 - IATP
 - UKATA
- Laboratory's 2017 4 rounds (ratings) of AIMS.
- Laboratory's 2017 4 rounds (ratings) of RICE.
- A copy of an example management survey report for a domestic dwelling
- A copy of an example re-inspection survey report for a block
- A copy of an example 4 stage clearance certificate
- A copy of your Staff Skills Matrix
- Qualifications of the surveyors and analysts which you plan to employ on this contract

5.4 ACCESS TO THE SITES

- 5.4.1 SHG will provide the successful bidder with all keys required to access the communal areas of residential buildings.
- 5.4.2 Access to the lift shafts and associated specialist non-domestic areas will be facilitated by the SHG specialist lift maintenance contractor.
- 5.4.3 Access to domestic dwellings, sheltered housing schemes, community centres, offices, schools and care homes must be arranged in advance with the tenant/ site representatives. Contact details for these sites will be provided to the successful bidder upon award of the contract.
- 5.4.5 Where access is required to a domestic dwelling for a programmed management, refurbishment or hybrid survey the Contractor will send a letter on behalf of SHG (using the SHG logo) advising residents that they are acting on behalf of SHG and to:
- explain the purpose of the survey,
 - to introduce the Contractor
 - Advice of the appointment date and time (AM/PM).
 - Advice of any necessary preparation by the residents.

The letter is to include a land-line contact telephone number in the event the resident has any concerns. The letter content is to be approved by the CM.

- 5.4.6 The Contractor is responsible for specific access arrangements, distributing the letter described above and for re-arranging access should access not be gained at the initial visit.

Therefore, it will be advisable to make contingency arrangements at the outset. SHG does not undertake to guarantee access and no claim for additional costs will be entertained arising from failure to gain access. Should residents decline to allow access to their home, or where the Contractor has failed to gain access on *three separate occasions*, the Contractor should contact the CM who will make alternative arrangements. Proof of attempted access is to be retained for audit, or use by the CM if requested (format to be agreed).

- 5.4.7 Surveys shall be conducted by the Contractor in a professional manner and must be carried out with due regard to residents' quiet enjoyment of their homes. Access arrangements should not be sought before 9am or after 5pm Monday – Friday, except in the case of emergency call-outs or with the express agreement of SHG.
- 5.4.8 The Contractor should be aware that some residents are from vulnerable groups and will require extra consideration. The Contractor will be expected to anticipate deafness, sight impairment, dementia, mobility impairment (including wheelchairs), and similar related issues, and take due account of these aspects when conducting site visits and undertaking surveys.
- 5.4.9 The Contractor shall offer reasonable flexibility in terms of appointments for site visits. In order to ensure access to all areas, it will be necessary to offer appointment times to schools for before and after school times (i.e. before 9am and after 3:30pm) and during school holidays.

- 5.4.10 If the site or any of its occupants will not allow access to the Contractor to undertake the required works in a reasonable timeframe, the Contractor must contact SHG immediately and advise them of the circumstances. SHG shall intervene to arrange access as necessary.
- 5.4.11 For planned surveys the Contractor should aim to give 5 days notice of an appointment, with 48 hours being the minimum acceptable notice period.
- 5.4.12 For surveys to void properties quick attendance on site is essential so as to not delay voids works. Upon receipt of the order it will be necessary to attend that same day or the morning of the following working day at the latest.
- 5.4.13 Address lists for proactive surveys in respect of strategic compliance and targeted refurbishment surveys (ahead of planned works programmes) will be given in advanced from which the contractor can plan/programme surveys.
- 5.4.14 It shall be the responsibility of the Contractor to provide a safe means of access into each work area (including voids, roof spaces etc.) and the bidder should ensure that all costs associated with obtaining safe access are included within the submitted rates. If the provision of safe access cannot be reasonably achieved (e.g. due to safety) the Contractor shall inform the CM.
- 5.4.15 Bidders are asked to submit a price for a refurbishment surveys to roof and roofline ahead of refurbishment works. In accordance with CDM Regulations 2015 all asbestos information must be provided to the Principal Contractor before works commence on site and therefore it will be necessary for the winning bidder to have their own mobile tower scaffold to enable asbestos surveys to be carried out. Bidders are asked to provide a cost for them to purchase a 6 meter tower scaffold, this will be a one off cost to SHG and the tower scaffold will be available for use on SHG sites at any time throughout the term of the contract to enable surveys to be carried out. In addition to refurbishment surveys the scaffold may be used at the request of SHG to allow areas at height to be accessed on management surveys. Payment for the tower scaffold will be made on commencement of contract.
- 5.4.16 Identity cards must be worn by all site staff and be permanently on display and automatically shown to residents and site management staff prior to entering their property. The card should include the organisation name, photograph and staff name. The identity card shall be enclosed in clear vinyl and be permanently sealed.
- 5.4.16 The Contractor is not to carry out work in properties where children (under the age of 18) are present without adults.

5.5 HOURS OF WORK

- 5.5.1 Works shall generally be undertaken Monday to Friday between the hours of 08.00am and 17.00pm.
- 5.5.2 The Contractor shall however offer reasonable flexibility in terms of appointments for site visits. In order to ensure access to all areas it will be necessary to offer appointment times to schools for before and after school times (i.e. before 9am and after 3:30pm).

5.5.3 On occasion evening and weekend working may be required, this however must be agreed with SHG and with the managers/occupants at the property in question.

5.6 EMERGENCY CALL OUT – IN AND OUT OF HOURS

5.6.1 SHG undertakes repairs, maintenance and other work to dwellings and other properties. In the course of these works materials suspected of containing asbestos may be encountered that will require analysis before any further action can be taken.

The Contractor must therefore be able to provide an emergency call out service both within and outside of normal working hours. The main objectives of the call out service will be:

- To provide a service whereby in the event of a suspect ACM being identified or disturbed, SHG can request immediate attendance by the Contractor and they will attend within 2 hours of receiving the call.
- The Contractor shall be requested to attend site, inspect the area or materials identified by others, take samples or undertake air sampling/clearance procedure where required and provide an analysis and summary report.
- That the competent persons attending must be qualified to undertake air testing and immediate on site analysis (i.e. the Contractor to provide a mobile testing facility) and clearance procedure (in accordance with HSG248).
- To work with the removal contractor in cases where immediate 'making safe' and/or environmental cleaning is required.

5.6.2 The Contractor must provide an out of hours emergency service at all times.

5.6.3 The Contractor must provide the names and telephone/mobile telephone numbers of at least 2 suitable competent persons who SHG may contact both during normal working hours and outside of normal working hours.

5.6.4 All emergencies must be confirmed via email to the CM on the next working day.

5.6.5 If there is an emergency at any time and the Contractor cannot or will not attend, or if the telephone is not answered, other arrangements may be made to deal with the emergency. Any additional costs plus a 10% administration fee arising out of having to instruct others will be deducted from monies owed to the Contractor.

5.7 WORKMANSHIP

5.7.1 The successful bidder shall ensure that all work is carried out by qualified and competent staff to a good standard of workmanship and to the reasonable satisfaction of the CM.

The Contractor must be able to demonstrate that all staff undertaking the bidded works have the minimum competence and experience, as follows:

- **Surveyors** – P402 qualified plus minimum of 1 year continuous practical surveying experience in domestic properties
- **Laboratory Analysts** – P401 qualified plus minimum of 1 year continuous experience
- **Air Testing and 4 Stage Clearance** - P404 and P403 qualified plus minimum of 1 year continuous experience
- **Contract managers** – minimum of 5 years experience in the domestic asbestos sector.

- **Project Managers** – CCP or CoCA qualified.
- **Asbestos Awareness Trainers** - CCP or CoCA qualified.

- 5.7.2 All works are to be carried out using electronic recording devices such as tablet PC/PDAs with all information recorded on the Contractors asbestos database. This shall be visible on a web based portal and access shall be organised for relevant SHG staff and commercial customers to view as needed for the length of the contract with training given by the Contractor at the beginning of the contract.
- 5.7.3 Bidders are advised that staff working on this contract that will be attending schools must be DBS checked. Evidence of such checks will be required from the successful bidder prior to commencement of site works. Any new employees working on the contract must not attend schools until DBS clearance has been shared with SHG.
- 5.7.4 All site staff shall have received appropriate health and safety training and passed an approved site safety passport scheme such as the CSCS scheme or similar approved.
- 5.7.5 It is an essential requirement of the Contract that Contractor and their staff work open and collaboratively with the SHG staff, resident representatives, residents themselves, other contractors (including those undertaking planned refurbishment works) and other specialists (including asbestos removal contractors), etc.
- 5.7.6 The CM reserves the right to issue instructions (but not unreasonably or vexatiously) requiring the removal from the Contract of any surveyor or other person if the CM considers that their performance and conduct is unsatisfactory.

5.8 DATA MANAGEMENT

- 5.8.1 The contractor will be required to provide a remote hosted electronic asbestos register database with read only web access to SHG staff and contractors. SHG request that the implementation of the Contractor register system is to be fully completed during the mobilisation phase and therefore ready for use immediately when the contract 'starts on site', i.e. the register system built, operational and ready to load the first new surveys.
- 5.8.2 The electronic asbestos register database will be updated by the contractor for **all** activity that they undertake and survey reports produced. The costs submitted in the Pricing Schedule (Appendix 1) will be deemed to include for updating/creating registers, production of survey report and uploading of photographs, plans, laboratory analysis, full PDF survey reports, removal certification, air clearance and consignment certification etc. In the event of surveys being cloned the system must be able to clearly indicating when a register entry is cloned and reference the property from which the data is cloned.
- 5.8.3 Upon completion of asbestos removal works, consignments notes and associated paperwork will be sent to the contractor and asbestos registers will need to be updated and new survey reports produced. Copies of consignments notes to also be saved on to the system for future reference. The database must also be able to provide sequential property history data, i.e. distinguish between ACMs subsequently removed/encapsulated, re-inspection reports etc
- 5.8.4 In order to ensure a consistent approach, the Contractor will be required to adopt a stock classification system for all recorded works. Stock is to be classified in accordance with the

following parameters:

- The address;
- The Unique Property Reference Number (UPRN);
- The archetype (i.e. House, Bungalow, Flat etc.);
- Communal (non-domestic areas) or Domestic (dwellings)
- The age of the property by year of construction.

In addition the Contractor should clarify communal and domestic areas and identify each room by a unique coding system, e.g. Living Room = LR, Bedroom 2 = BR2, Hall = HA, Landing = LA, a cupboard under the stairs in the hall = HAa. These codes should be duplicated on all floor plans. The coding system will be discussed and agreed upon award.

- 5.8.5 Information derived from the surveys will be used to facilitate effective, easily up-dateable maintenance, management and control systems. The survey results and data held upon the remote hosted register system (provided by the Contractor) must therefore be flexible, easily accessible/interrogated and maintainable.

Specifically SHG would like the system to be able to provide an extracted summary report in Excel to include all accumulated register information. Format to be agreed upon award. The database must also be able to retain recommended re-inspection period per ACM to drive the reinspection programme.

- 5.8.6 SHG and contractor web access is to be via a web portal that can be accessed via a Wifi and 4G connection. The portal must be compatible with both desktop and mobile devices (e.g. mobile phones and tablets). Access on a mobile device must be compatible with all operating platforms (e.g. Android, Windows and Apple)
- 5.8.7 Portal user licences are to be unlimited, not a charge per licence.
- 5.8.8 The Contractor will need to be able to provide training on how to use the portal and be able to provide management reports on user activity.
- 5.8.9 The portal must have a flexible, user friendly search engine facility and be able to provide users with quick reference summary asbestos register information by property address / UPRN in addition to the full survey report. Must also be able to provide different users with different access levels/rights.
- 5.8.10 The asbestos register database must have the functionality to produce management reports to SHG on percentage surveyed, report by risk score, highest ACM risk per property, no access areas, refused access, re-inspection programming, etc.
- 5.8.11 Bidders should be able to demonstrate experience with system integration with housing management systems. SHG would specifically like to explore integration options that would allow high level asbestos warning alerts to be visible in their housing management system (Northgate).
- 5.8.12 SHG's existing asbestos register information is held within a web accessible register portal. SHG may request that the contractor carry out retrospective entry of these survey records into their register data system. A data extract can be provided from SHG's current system to assist with this data assimilation task and if required the data assimilation

is to be completed within 3 months of data provision.

- 5.8.1 SHG will expect the contractor to have 'resilience' built in to their register system and have disaster recovery arrangements in place in order to prevent 'downtime' and ensure data recovery in the event of data loss. If changes are to take place on Contractor system, these are to be scheduled and notified to SHG a week in advance.
- 5.8.9 If the IT system used by the Contractor fails at any time, the Contractor shall use a manual system to maintain the survey programme and register data whilst the primary system is restored.
- 5.8.10 As part of the on-going annual fee for data management, the Contractor is to allow for all associated system maintenance, uninterrupted system access, fault rectification.
- 5.8.11 The data (and all associated paperwork) within the asbestos database remains the property of SHG and will need to be made available to SHG at contract end, including all associated electronic attachment files (photographs, reports etc.), or if terminated early for any reason, at no charge to SHG.

5.9 TENANT COMMUNICATION

- 5.9.1 The Contractor will be required to produce 'tenant friendly' survey report summaries and covering letters and posting these on behalf of SHG to individual householders within 1 month of completed individual management surveys (to domestic units). The template letter and summary survey results format will be agreed upon award. The Contractor will be required to extract the appropriate data from their survey reports, populate the template and issue (together with the covering letter) direct to the resident in each case, and simultaneously send a electronic (pdf) copy of the survey summary/letter to SHG for their records. All associated costs are to be incorporated within the survey tender rates provided. SHG will provide the electronic letter template including logos. The Contractor is to maintain an auditable record of the dates resident summary survey information is issued in each case.
- 5.9.2 SHG may also request the support of the Contractor in writing asbestos awareness leaflets for tenants.

5.10 HEALTH AND SAFETY PROVISIONS

- 5.10.1 The Contractor will be required to undertake all works associated with this bid in a safe and competent manner and shall, at all times, comply with all current health and safety legislation, regulations and approved codes of practice.
- 5.10.2 Works shall be undertaken in accordance with the following legislative requirements;
 - The Health and Safety at Work etc. Act 1974
 - The Management of Health and Safety at Work Regulations 1999
 - The Workplace (health, safety and welfare) Regulations 1992

The Personal Protective Equipment at Work Regulations 1992

The Provision and Use of Work Equipment Regulations 1998

The Control of Substances Hazardous to Health Regulations (COSHH) 2002

The Control of Asbestos Regulations 2012

The Electricity at Work Regulations 1989

The Hazardous Waste Regulations 2005

5.10.3 In addition, the works shall be undertaken specifically in accordance with the following approved codes of practice guidance;

ACOP L143

HSG 264

HSG 248

5.11 RISK ASSESSMENT AND METHOD STATEMENT

The bidder is reminded that all works undertaken must have a valid and site specific risk assessment and method statement. The risk assessment and working methods must assess the risks posed by the specific task being undertaken.

5.12 SECURITY AND DISRUPTION TO BUILDING OCCUPANT AND TENANTS

5.12.3 The successful bidder shall undertake the required works in such a way as to minimise disruption to the buildings occupants and tenants. The Contractor shall confine his operations to the minimum area required for the execution of the services.

The Contractor shall take reasonable precautions to prevent surveyors and sub-contractors from trespassing on adjoining owner's property and any part of the premises which are not affected by the surveys. If the execution of the survey requires that surveyors must enter upon adjoining property, the necessary permission shall be obtained by the Contractor.

5.12.2 The Contractor must provide for the efficient protection of the general public and the occupants and users of the premises and adjoining premises during the progress of the services included in the Contract and the Contractor shall, for this purpose, guard and protect his tools and materials and take all necessary measures in order to prevent accidents.

The Contractor shall warn occupiers and the public of any potentially dangerous operations, materials, plant and chemicals.

5.12.3 The Contractor shall inform the CM if working in a particular property presents a health and

safety risk to operatives, for example, dangerous pets, syringes, excrement etc.

5.12.4 During the surveys, the Contractor shall be responsible for the safety and security of the premises, personal effects, furniture, floor coverings, curtaining, etc.

5.12.5 The Contractor shall be responsible for moving and replacing any furniture, fittings, apparatus, etc. where necessary for the execution of the service. The Contractor may request the resident to remove small items of value. At completion of the survey the Contractor is to replace and refit all such furniture, fittings, apparatus, or the like in their original positions, to residents' satisfaction.

5.12.6 Any damage, which arises as a result of the work to residents' goods or furnishings, shall be made good at the Contractor's expense. All furnishings, fixtures and fittings shall be fully protected against damage or potential asbestos fibre release (as a result of the Contractor's direct survey/site audit related activity) at all times.

Any damage or alleged damage to residents' effects must be reported to the CM immediately.

5.12.7 The Contractor shall ensure that the property including adjoining property and its contents are completely secure from theft, vandalism, etc. and at no time are left unsecured. Any loss or damage caused by the Contractor's failure to comply with this section will be made good by the Contractor, to the entire satisfaction of the CM at the Contractor's own expense.

5.13 CONTRACT INITIATION

5.13.1 The bidder shall allow in his costs for all preliminary planning and mobilisation costs.

5.13.1 The successful bidder shall attend a formal pre-start meeting with the client and other key stakeholders to plan the works and agree day to day lines of communication and reporting.

5.14 CONTRACT MANAGEMENT

5.14.1 The Contractor shall assign a named Contract Manager, to whom directions may be given by the CM and who will be empowered to act upon such directions.

5.14.2 The Contractor shall provide a means of direct telephone communication with the Contract Manager.

5.14.3 During working hours, the telephone service shall be manned and consist of at least one exchange line for the receipt of telephone enquiries from SHG.

5.14.4 The Contractor shall provide sufficient e-mail addresses as may be necessary to efficiently handle electronic correspondence from SHG staff, e.g. separate personal e-mail addresses and shared mailbox.

5.14.5 The Contractor shall, during normal working hours, maintain phone contact with his surveyors whether on site or not.

5.15 INVOICING

- 5.15.1 Only completed orders will be invoiced by the Contractor, a completed order is after a survey has been undertaken, a report has been provided to the CM, supporting details have been provided (including photographs and plans) and the Contractors remote hosted electronic register system has been updated
- 5.15.2 All invoices must be received within 6 weeks of job completion, failure to do so may lead to non payment.
- 5.15.3 Bidders are asked to submit an annual price for data management, it is anticipated that this will be paid via a 1/12th monthly payment.

5.16 WORK IN PROGRESS

- 5.16.1 The following information is to be provided by the Contractor to the CM upon request in a format approved by the CM:
- A report detailing completion of any survey (or removal related analyst services), the order number, target completion date, the actual completion date, date samples were taken, date analysed, date survey report completed and submitted and Contractor remote hosted electronic register system updated.
 - Reasons for surveys not being completed by the target completion date and the date the resident was informed of the appointment if applicable.
 - Details of surveys which will not be completed by the target completion date, including reasons why, whether the delay is due to the Contractor, the CM, or the resident and a revised target completion date.
 - Details of 'access prevented' within communal (non-domestic) areas (due to locked rooms/ cupboards, incorrect keys etc.).
 - Details of any no accesses or access refused

5.17 KEY PERFORMANCE INDICATORS (KPIs)

5.17.1 The Contractor is expected to provide an extremely high quality service to SHG and to it's residents. This includes satisfactorily completing services within the specified time periods, good customer liaison, efficient and accurate paperwork, register compilation, maintenance and hosting, prompt submission of accounts and immediately responding to any complaints received. The Contractor's performance will be closely monitored at all times.

5.17.2 SHG will monitor the performance of the successful bidder by regular contract progress meetings (anticipate monthly) and by site checks and audits as SHG deem necessary.

The contractor will be required to provide data that will be used to form KPIs on compliance and response; these will be reviewed monthly within SHG and in monthly contractor meetings.

5.17.3 Important performance indicators to be monitored will include (but are not limited to) the following. Scoring methodology to be agreed upon award.

KEY ACTIVITY	DESCRIPTION	KEY PERFORMANCE INDICATOR TARGETS
Appointments	The number of appointments made and kept	100%
Surveys	The number of surveys completed on time (i.e. surveys completed on site).	=>95%
Access	The percentage of properties where access is not gained after 3 attempts	=<10%
Re-inspections	The number of re- inspection surveys completed in time	100%
Asbestos reports	The number of asbestos reports received in time (this to include availability of report on portal and also posting of complete pdf reports to tenants/).	=>95%
Asbestos register	The number of register entries and certification entered / updated on the portal in time (to include surveys, re-inspection, removal and site audit data).	=>95%
Complaints	Number (Nr) of complaints received in relation to addresses issued where surveys have been carried out in the period	=<3%

5.17.3 Repeated failure to meet KPI's may result in the contract being terminated.

5.17.4 Below are some examples of timescale that SHG will require the Contractor to be able to adhere to. The required completion time would be specified at the point SHG request the job.

Service	Timescale Detail	Required Timescale
Survey Completion	Time from receipt of job to attendance on site	28 calendar days
		5 working days
		3 working days
		By 12pm of the following work day
		Same Working Day
Sample Analysis	From time sample taken to issue of bulk sample certificate	3 working days
		24hr working day
		4hr working day
		2hr working day
Programmed Management Survey to Domestic Dwelling	From survey completion on site to issue of asbestos survey report	7 working days
		3 working day
Void Property/Non Programmed Management Survey to Domestic Dwelling	From survey completion on site to issue of asbestos survey report	7 working days
		3 working day
		24hr working day
Communal Block Management Survey	From survey completion on site to issue of asbestos survey report	7 working days
Programmed Refurbishment or Hybrid Survey to Domestic Dwelling	From survey completion on site to issue of asbestos survey report	7 working days
		3 working days
Void Property/Non Programmed Refurbishment or	From survey completion on site to issue of asbestos survey report	3 working days
		24hr working day

Hybrid Survey to Domestic Dwelling		
Communal Block Refurbishment Survey	From survey completion on site to issue of asbestos survey report	7 working days
Communal Block or School Reinspection	From survey completion on site to issue of asbestos survey report	7 working days
Emergency Response Sampling	Arrival on site	2 hours
Updating registers following survey or reinspection (NB this is for registers to be updated not issue of survey report)	From survey completion on site to registers being updated on the contractors asbestos register	10 working days
Updating registers following removal works	From receipt of consignments notes to updating the register and producing new survey report	5 working days

5.18 AUDITING, QUALITY CONTROL AND TRAINING

5.18.1 The Contractor will implement policies for quality control and quality assurance procedures, including a specific quality control scheme for survey reports.

5.18.2 A proportion, equating to approximately 5%, of surveys undertaken upon SHG stock are to be routinely independently (internal quality assurance manager or equivalent) re-inspected in accordance with the provisions of HSG264, and results shared with the CM as part of the on-going monitoring regime. This is not a chargeable service. The number of repeat samples should be adequate to detect errors and will vary with the complexity and variety of the materials being surveyed, but will otherwise comply with the recommendations within HSG264 and HSG248.

SHG also reserves the right to carry out/commission its own independent audits of completed surveys/services provided in addition.

5.18.3 The Contractor will be required to demonstrate that the quality control procedures adopted in the laboratory analysis procedures (including mobile van) are adequate and can demonstrate adequate competence to carry out bulk asbestos analysis through staff training records,

certificates from external training providers, testing programmes, participation in quality assurance schemes (RICE, AIMS etc.), satisfactory performance in national proficiency testing programmes and accreditation to ISO 17025.

This requirement is also to apply to the quality control procedures adopted in respect of the on-site analysis procedures relating to air testing and clearance procedures.

5.18.4 The Contractor is to ensure that samples or representative samples are kept for a period of at least 6 months after analysis to allow quality control checks to be made.

5.18.5 An annual training plan for all the Contractor's surveying (and other relevant) staff specific to this contract is to be provided by the Contractor at the commencement of the Contract to show all planned staff training and development for the following year.

5.19 CONTRACT REVIEW

5.19.1 The bidder shall allow for attendance and reporting on contract performance at regular contract review meeting. It is anticipated that these meeting will be at a minimum of monthly intervals for the first 12 months. After that if SHG deem that the contract is proceeding well and the Contractor is meeting all KPI's they may reduce the frequency of the meetings.

5.19.2 The meeting will include, but will not be restricted to, the bidders adherence to programme, access issues, reporting, performance against KPI's, safety performance, quality of work, billing, complaints & anomalies.

5.19.3 SHG may request the contractor to submit progress information, KPIs data and audit results ahead of the meeting for review and discussion at the meeting.

5.20 DOCUMENT REVIEW

5.20.1 SHG request that during the first 6 months of the contract that the successful contractor support SHG in reviewing and updating their Asbestos Procedures, Policy and Management Plan and every 12 months thereafter.

5.20.2 SHG also plan to shortly advertise a tender for placement on their asbestos removals framework. SHG will request the support of the Contractor in reviewing all tender documentation before release.

5.20.3 SHG also request the support of the Contractor in reviewing their current communal area management surveys in order to determine and instigate an appropriate re-inspection regime.

5.20.4 In addition the Contractor is to undertake a 'desk top' review of SHG domestic property attribute information available (age, configuration, construction type, including non traditional construction) and existing asbestos register/survey information and produce a high level/simple strategic prioritisation for completion of management surveys.

5.21 DETAILED SPECIFICATION OF WORKS - ASBESTOS SURVEYS

5.21.1 SHG wishes to commission surveys and reinspections of its housing stock and communal areas in order to obtain good quality information on the presence and condition of asbestos containing materials (ACMs), which will ensure that they meet all its current and future proposed duties with respect to asbestos.

The Contractor will undertake **management**, and **refurbishment and demolition surveys** (as defined in HSG264 Asbestos: The survey guide and any future revision). The Contractor will also be required to undertake **re-inspection surveys** (of surveys previously undertaken by themselves or others) where required by SHG.

5.21.2 The Contractor should have regard to, and follow the recommendations of all existing and proposed legislation, British and European Standards, Approved Codes of Practice, Health & Safety Executive (HSE) Publications and Guidance Notes (in particular HSG264) and established good practice.

5.21.3 Surveys will be carried out methodically, systematically and diligently to ensure ACMs are not missed and all areas of the premises are inspected.

5.21.3 Inspections of all accessible voids must be carried out, including roof spaces. It is not anticipated that casings to electrical or gas heating appliances will be removed as part of surveys.

5.21.4 Access to specialist areas will be arranged by prior notification to the CM, examples will include specialist M&E rooms or lift shafts/motor rooms.

5.21.5 Floor tiles and associated potential asbestos containing adhesives are each to be provided with a separate distinct ACM entry within the survey reports and the Contractors register system.

5.21.6 Labelling of asbestos products will not generally be required in domestic premises, however appropriate labelling is required in areas that are not accessible to the residents or the public (e.g. within plant rooms, electrical cupboards, lift motor rooms, non domestic roof voids, etc.). Labelling will therefore be undertaken by the Contractor when undertaking re-inspection surveys.

5.21.7 If, during the course of the survey, any deleterious materials or repairs requiring urgent attention or further investigation are discovered or suspected, the Contractor shall notify SHG **immediately** by telephone (this includes any hazard that might be classified as 'Category 1' under the Housing Health and Safety Rating System - Version 2). A written memorandum listing the key issues and any recommendations shall be issued to the CM within 48 hours of any such telephone notification.

5.21.8 Under no circumstances shall the Contractor advise the resident that any repairs or improvements will be undertaken. If specific repairs are requested the resident should be referred to SHG's usual routes of repairs reporting.

5.21.9 Asbestos survey reports should include:

- Scope of survey – including the survey type, areas included in the survey, areas excluded from the survey.

- General building information – not required for re-inspection surveys
- Survey limitations – areas that could not be accessed and the reasons why, e.g. due to no access, unsafe conditions.
- Building register including details on:
 - the location,
 - product type,
 - the type(s) of asbestos the product contains,
 - its extent,
 - condition (both product itself and surface treatment),
 - accessibility,
 - surface treatment,
 - the risk of fibre release for each individual ACM,
 - a material risk assessment,
 - if the ACM presumed or contained.
- Photograph of the outside of the building on the front page of the report and a photograph of all items surveyed.
- A location plan for each floor annotated to reference locations for:
 - all ACMs found, presumed or materials positively demonstrated as asbestos free
 - Any areas that were excluded from the survey or could not be accessed.
 - When ACMs are subsequently removed, this is to be clearly indicated upon the updated survey plan as part of the survey report/register update procedure undertaken by the Contractor;

NOTE - Location plans are required for communal blocks and schools only, not domestic dwellings.

Where SHG have existing plans available these will be provided however SHG cannot guarantee that they are available.

- Any remedial actions/recommendations required to manage and control the risk from ACMs, this should be provided against each ACM identified and also provided in a summary page. The requirement for any future monitoring of the ACM, including proposed frequency of monitoring should also be stated.
- Copies of all certificates of bulk fibre analysis.

The exact format and layout of survey reports to be discussed and agreed upon award.

5.2.10 The Contactor needs to be able to provide the following information for each survey (or equivalent service) undertaken

- Tabulated 'interim survey summary' report (if required to enable urgent works to proceed);
- Electronic (pdf) survey report document (individual full stand alone format, including plans/photographs/laboratory results); and
- Contractor remote hosted electronic register system update (including associated certificates/documentation/pdf survey report attachment);
- Electronic summary data file for each property, with summary survey data
- 'resident friendly' survey report summary and covering letter. Hard copy to resident, pdf copy to Employer. This to apply principally to new full domestic management surveys.

5.2.11 Each report produced will be checked by an authorised person before being issued to SHG. The checks must ensure that the report contents are technically consistent, accurate and complete.

In particular, the Contractor is to check:

- 1) the Customer's instructions for the survey and report have been followed
- 2) all site notes agree with the final report
- 3) no observed ACMs have been omitted
- 4) all appendices (ie certificates of analysis) are included as required
- 5) all titles, reference numbers and descriptions are correct
- 6) the assessments and recommendations for any remedial work are appropriate
- 7) the report summary is included and is a fair statement

5.22 DETAILED SPECIFICATION OF WORKS - ASBESTOS SURVEYS ASBESTOS MANAGEMENT SURVEYS

5.22.1 The winning bidder will undertake management surveys in order to manage asbestos-containing materials (ACM) during the normal occupation and use of properties.

5.22.2 Each area will be surveyed with due care to avoid missing any ACMs. The surveys shall be visual identification, sampling and assessment surveys, except where stated otherwise.

5.22.3 Intrusive testing and sampling of materials is required. Where necessary, this shall include the use of a specialist vacuum cleaner fitted with a High Efficiency Particle Arrester (supported by valid certificate). The Contractor must thoroughly clean, seal and make good any surfaces disturbed, to as close to an indistinguishable repair standard as is reasonably possible, as the survey progresses. The location of sampling are to be as discretely positioned as possible in order to not cause undue aesthetic damage to the residents decoration (example: sampling in corners or near skirting, rather than mid height).

5.22.4 It is anticipated that during the survey of a domestic dwelling of a house that no more than 7 samples will be required, 5 in a flat. If the surveyor feels that additional samples need to be taken they should contact the CM to discuss.

5.22.5 Sampling to textured coating within a domestic dwelling will be expected to be not less than one sample per floor level. This frequency to be increased where pattern indicates differing materials or dates of application.

5.22.6. Management surveys to communal areas will require a 2 person survey team (lead and assistant surveyor) to ensure access to all area, e.g. may be requirement to access areas at height, lift access hatches etc. Surveys to some domestic dwellings may also require a 2 person survey team (lead and assistant surveyor), if this is required it will be discussed at the point of job request.

5.23 DETAILED SPECIFICATION OF WORKS - ASBESTOS REFURBISHMENT SURVEYS

5.23.1 Asbestos refurbishment surveys will be required to specific locations or equipment ahead of planned refurbishment works in order to enable contractors to undertake works with

a clear understanding of ACMs present in the areas likely to be disturbed as part of their work.

5.23.2 SHG will provide the Contractor with details of the extent of work expected to be carried out within each property; including if ceiling or floor finishes are to be removed, if voids or ducts are to be opened up, roof voids accessed, floor boards lifted, and if chasing is required for electrical conduit etc

5.23.3 The Contractor will be expected to work with SHG to scope the extent of work envisaged in each case and to identify relevant property archetypes and confirm when sufficient repetition of ACMs identified has been reached (through their surveys) to “demonstrate as far as reasonably practicable that there is consistency in the range of ACMs in the property type and there is an accurate picture of asbestos presence” (HSG264).

5.23.4 Surveys may be required to both domestic dwellings and areas within communal blocks. SHG may also request that at the same time a full management survey also be carried out, i.e. hybrid survey.

It is not anticipated at this stage any requirement for full property refurbishment or demolition survey

5.23.5 If the survey involves destructive inspection and asbestos disturbance, the area surveyed must be vacated and certified 'fit for reoccupation' on completion of the survey.

5.23.6 All ACM's, even where removal is initially anticipated as part of the works to follow, must still be provided with a risk assessment score in order that should work be delayed beyond 3 months post survey, or subsequently refused by the resident, SHG will still have complete asbestos register entry.

5.24 DETAILED SPECIFICATION OF WORKS - ASBESTOS REINSPECTION SURVEYS

5.24.1 Asbestos reinspection surveys will be required to communal areas within blocks and also schools where ACMs have been previously identified. Where the management survey and any previous reinspections have been completed by others all relevant documentation will be provided by SHG.

5.24.2 The survey shall comprise a visual assessment survey of all ACM's previously identified. The Contractor shall assess whether there has been any change in the condition of all ACM's identified and report accordingly. This is to include the requirement to undertake additional sampling where visual inspection was undertaken previously, or to access areas previously not surveyed. In addition the Contractor shall immediately notify SHG of any errors found in the existing/previous survey data.

5.24.3 Floor plans should be updated where necessary on reinspection. Where floor plans were

not previously provided as part of the original / previous survey report, the Contractor is to provide these as part of the re-inspection survey report process.

5.25 DETAILED SPECIFICATION OF WORKS - AIR MONITORING

The Contractor at the request of SHG will provide analytical air monitoring as required. Air monitoring requests maybe in either or a combination of Background/ Leak/ Reassurance/ Personal/ Four-Stage Clearances

5.26 DETAILED SPECIFICATION OF WORKS - AUDITS

5.26.1 SHG have arrangements in place with asbestos removal contractors to carry out removal and remedial works to asbestos containing materials in its properties. The Contractor may be required to audit / monitor the work of the asbestos removal contractor on a sample basis when so ordered by SHG.

5.26.2 Where instructed by SHG the Contractor shall monitor representative sample works on site to include (where appropriate):

- Checking adequacy of method statements and risk assessments;
- Checking the construction and performance of any enclosure erected for the purpose of carrying out works (to include supervision of the smoke test);
- Attendance on site while works are in progress to make random spot checks of the work;
- Carrying out reassurance monitoring outside the enclosure while works are in progress;
- Once works are complete, attending site to ensure that the enclosure is clean prior to its removal;
- Once the area has been cleaned and checked by the asbestos removal contractor carrying out a final visual inspection and air sampling to ensure that the area is ready for reoccupation;
- Undertaking analysis of the sample and providing a certificate of reoccupation; and
- Providing the Employer with brief written reports identifying any issues, trends, or suggested corrective actions.

5.27 DETAILED SPECIFICATION OF WORKS - TRAINING

5.27.1 The Contractor will be required to undertake a joint review of the training requirements of SHG staff and operatives and co-develop an appropriate training matrix with appropriate tiers of training and associated repeat cycles for technical and non-technical staff.

5.26.2 The Contractor will provide all associated asbestos related training to SHG staff for the duration of the Contract; this may be extended to any of SHGs partners, or external contractors to ensure SHGs current and future duties in regard to asbestos are met in full.

5.26.3 SHG request that content be tailored to be relevant to SHG's area of business, with the option for practical training as well. The provision of training to be provided by the Contractor is to include the option of intermediate certified 'e-learning' as part of the agreed training matrix.

5.26.4 Awareness Training is to be UKATA or IATP certified with the option for delivery at both SHG offices and contractor offices. All training is to be delivered by contractors own directly employed staff and they must be appropriately qualified and experienced as detailed in 5.7.

5.26.5 It is anticipated that training requirements will include asbestos awareness training and a small volumes of P402 refresher training. It is not anticipated that there will be requirement for non licenced asbestos work training.

PART 6 – TENDER RESPONSE DOCUMENT

6.1 CHECKLIST FOR TENDERERS

Failure to provide all of the items in the checklist may cause your tender to be non-compliant and not considered.

ITEM	INCLUDED IN TENDER?
Completed Tender Response Questionnaire	
Completed and signed Form of Tender	
Completed and Signed form of Non Canvassing	
Completed Pricing Schedule	
Mandatory Submission Documentation as requested in 5.3	
Completed copy of the Social Value Minimum Requirement document	
Completed copy of Social Value Tender Response Questionnaire	

6.2 Tenderers must ensure that their tender response is submitted in the format prescribed within the Tender Response Questionnaire. Attachments should only be enclosed where requested. Unnecessary attachments will not be read and therefore not scored.

6.3 Should you include attachments (where requested) in support of your response, they should be referenced with the name of your organisation and cross referenced with the relevant section number. Attachments which are not suitably labelled or indexed or which exceed the word limit (where one is imposed) will not be read and therefore not scored.

6.4 EVALUATION AND AWARD CRITERIA

Set out below is the weighted evaluation for SHGs Requirements

Criteria / Questions	Weighting
Price	30%

Quality Questions	70%
Total	100%

The Criteria / Questions Weighting is broken down as follows:

Section	Assessment
Supplier Information	Not scored
Mandatory Exclusions	PASS/ FAIL
Discretionary Exclusions	PASS / FAIL
Insurance	PASS /FAIL
Laboratory and Staff (a-h)	PASS / FAIL
Living Wage	PASS / FAIL
Social Value	PASS / FAIL
Form of Contract	PASS / FAIL
Quality Questions	70%
Pricing Schedule	30%
Interviews	Not scored, however quality responses can be clarified at interview and scores adjusted to reflect this

Where sections are scored, the following methodology will apply to each of the questions asked:

Assessment	Detail	Score
Excellent	Excels in meeting the criteria	5
Good	Meets the criteria	4
Satisfactory	Meets the criteria in most aspects, fails in some	3
Unsatisfactory	Fails to meet the criteria in most aspects meets it in some	2
Poor	Significantly fails to meet the criteria	1

Not to be considered	Completely fails to meet the criteria	0
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Price Evaluation Process:

30% will be awarded to the lowest priced bid, subject to the quality of the bid being acceptable.

All other bid prices will be awarded a relative percentage to the lowest bid using the following process:

$$\text{RELATIVE PERCENTAGE} = \text{lowest priced bid \%} / \text{bid price being evaluated} \times 30$$

If SHG considers that a Pricing Schedule submitted by a Tenderer is abnormally low SHG may request a written explanation. SHG will take into account any explanation which justifies the Pricing Schedule. If, after considering any explanation, SHG, acting reasonably, still considers that the Pricing Schedule is unjustifiable or otherwise abnormally low SHG will verify with the Tenderer that the Pricing Schedule (or part of it) is abnormally low and may reject the Tender in its entirety. In the absence of manifest error the Tenderer will not be able to alter the Pricing Schedule once submitted and this paragraph should not be viewed by any Tenderer as an opportunity to do so

6.5 PRICING SCHEDULE

Please complete the attached pricing schedule attached at Appendix 1 and return with all your Tender Documents.

PART 7 – FORM OF TENDER

Please sign and return this form with your completed Tender



TO: STOCKPORT HOMES LIMITED ("SHL")

I/Wecarrying on business at

..... (registered office) hereby Tender and undertake to execute and complete all the services required to be performed in accordance with the specification for the provision of Asbestos Surveying and Retained Advice.

I/We agree that this Tender shall remain open to be accepted or not by SHG and shall not be withdrawn for a period of six months from the latest date for receipt of Tenders.

I/We further undertake to execute a contract in the form of a JCT Measured Term Contract, and further undertake if required to provide a Guarantee by our Holding Company as required.

Unless and until a formal agreement is prepared and executed, this tender together with your acceptance thereof in writing, shall not constitute a binding Contract between us.

I/we understand that you are not bound to accept the lowest or any Tender you may receive.

Signed

Name _____

Date _____

Title _____

Tenderer's Signature by duly authorised person(s) on behalf of the Tenderer.

_____ (Print name of signatory in full)

Name or title of Tenderer

PART 8 – CERTIFICATE OF NON CANVASSING

Please sign and return this form with the Tender



CERTIFICATE AS TO CANVASSING

TO: STOCKPORT HOMES LIMITED (SHL)

I/We hereby certify that I/we have not canvassed or solicited any Member or employee of Stockport Metropolitan Borough Council or SHG in connection with the award of this Tender or any other or proposed Tender for the Service, and that no person employed by me/us or acting on my/our behalf has done any such act.

I/We further hereby undertake that I/we will not in the future canvass or solicit any Member, or employee of SHL in connection with the award of this Tender or any other tender or proposed Tender for the Service, and that no person employed by me/us or acting on my/our behalf will do any such act.

Signed

(1) _____ Name _____ Title _____

On behalf of _____

Date _____