# Specification of Services Required

* 1. The Council requires a supplier to deliver energy consultancy and management services to support a property portfolio containing a variety of multi-use buildings within the boundary of North Somerset Council, including schools that have opted into the Corporate Energy Contract (for boundary map see **ITT Volume 1**).
	2. The Council requires a suitably established and experienced supplier with skilled and knowledgeable staff and clear reporting and management structures. Both a dedicated contract manager, appropriately experienced and skilled, and a support team are required to deliver this contract, with a balance of inhouse and external resources.
	3. The Supplier shall receive a Utility (Property) Database. The Supplier will maintain the Utility (Property) Database and will add any other information they may wish to be included or should be required to enable the outputs to be produced.
	4. The Council’s estate is constantly changing therefore updates to the Utility (Property) Database will be required. It will be the responsibility of the Supplier to maintain the accuracy of the database by means of a monthly regular updating exercise. The Supplier will proactively manage this process.
	5. The scope of work is the provision of energy consultancy and management services. The contract will cover but not be limited to all of the following areas:-
	6. General Services
		1. Energy efficiency advice
		2. Energy projects advice
		3. Carbon reduction advice
		4. Energy market cost monitoring and advice, in particular measured against existing contracts
		5. Energy procurement support and advice
		6. Data capture, monitoring and reporting services for utilities
		7. Services and reports to support statutory reporting on energy and carbon
	7. Gas and Electricity Energy Management Services
		1. Pro-actively collecting data, processing and analysis of energy invoices for Council sites as described in **Appendix E**
		2. Monitoring and Targeting (M&T - data analysis) of main utilities and sub-metering
		3. Bill validation and management of recovery with suppliers
		4. Maintaining the main property database
		5. Production of reports
		6. Provide Help Desk Service to Client and Site Users
		7. Site surveys
		8. Manage change of tenancy agreements, new connections and disconnection of supplies as needed
		9. Setting of consumption profiles and generation of alarm messages where excess consumption is detected
		10. Support the Council with its meetings and liaison with its gas and electricity suppliers as required

The Supplier shall:

* + 1. Set up a database of information, including import of historical data from existing service provider(s), and maintain it
		2. Carry out bill validation including resolving any queries with respect to billing information / data
		3. Analyse energy consumptions, costs and tariffs and advise on opportunities and issues for improvement and reduction
		4. Provide monitoring and targeting outputs as **Appendix F**
		5. Provide regular reports at the intervals specified in **Appendix F**
		6. Undertake benchmarking against best practice
		7. Be proactive in identifying areas where adjustments can be made to reduce energy consumption and waste
		8. Provide a help line service for all queries from sites and Client
		9. Provide site visits if necessary
		10. Manage new connections as instructed
		11. Assist with change of tenancy agreements as instructed
		12. Provide services and reports enabling statutory reporting, currently the Carbon Reduction Commitment Energy Efficiency Scheme (CRC EES)
* Monthly and yearly consumption reports
* Footprint and annual reports
* Financial forecasts
* Advice on strategies to improve reporting, performance and ranking
* Maintain electronic and paper records for possible audits

m. Provide support and expertise within the Council’s energy procurement activities, including, but not limited to, the development and evaluation of the Energy Supply Framework recommission and furthermore carrying out mini-competitions off the new and existing Energy Framework on the Councils behalf

* 1. Additional / Ad-hoc Call Off Services which may be required and for which the supplier must have capability and capacity
		1. Display Energy Certificates

b. Energy Performance Certificates

c. Water efficiency and reduction advice, including bill validation

d. Management of installation of AMRs for new energy supplies

e. Data collection and capture from individual sites or AMRs, monitoring, processing and reporting for other energy supplies including but not limited to:

* Oil
* Liquefied Petroleum Gas
* Bio-mass
* Water, Sewerage and Surface Drainage
* Renewable Electricity Generation from the Feed-in-Tariff

f. Undertake energy and water surveys as required. Finance most likely to be raised through identified savings

g. To assist with calculating the recharge of energy costs to tenants and other parties where applicable

h. To provide other ad-hoc project call off services

Additional / ad-hoc call off services are subject to requirement and is not guaranteed. Project work can include but not limited to,

* Arranging new power / gas supplies through the relevant utility company and network operator
* Arranging meter installations and connections
* Assisting with emergency works

Site attendance and/or assistance for ad hoc projects requires a response time of 5 working days.

Site attendance and/or assistance for emergency works requires a response time of 24 hours.

The nature of the project works could include refurbishment, extensions and new builds relating to either the Council’s corporate estate or school buildings. The supplier will liaise directly with the utility company and network operators. Any invoices processed by the supplier as a result of liaising with the utility companies direct will be reimbursed by the Council on an at cost basis.

 Tenderers will be deemed to have acquainted themselves with all matters relating to the sites, access and contract prior to tendering and no claims due to want of knowledge in this respect will be entertained.

*Data Collection*

* 1. The Supplier shall obtain utility bills and data directly from the Council’s Corporate Energy Contract suppliers.
	2. The Supplier shall communicate with North Somerset Council where appropriate in order to become familiar with the contracts for Electricity and Gas to customers under this arrangement.
	3. The Supplier shall obtain initial property and energy details directly from the existing database. The Principal Mechanical, Electrical and Energy Engineer for North Somerset Council will arbitrate in cases where the required information is not available for any reason.
	4. The Supplier shall manage the Monitoring and Targeting database. The Supplier shall provide for the collection of sub-meter information where required, for example, individual buildings and CHP systems.

*Utility Data Analysis*

* 1. The Supplier shall validate, by comparison with the occupant's meter readings, historical data or by on-line independent meter readings, all the data contained on each invoice received whether estimated or meter read.
	2. The Supplier will confirm to the client that the invoice is either approved for payment or to be queried. Any queries should be resolved as required and the site managers kept informed of problems and progress.
	3. The Supplier will analyse all aspects of the utility invoice to confirm that the most advantageous and environmentally acceptable conditions are being maintained (e.g. tariff structure (Contract/Tariff rates), Electrical Power Factor, Supply Capacity, Meter type, etc).
	4. The Supplier shall make recommendations for negotiations with utility suppliers etc.

*Monitoring and Targeting*

* 1. The Supplier shall carry out a monitoring and targeting service providing output reports as per **Appendix F** as well as any other output reports the client may require. The requirement will primarily be to provide exception reports, league tables and summary reports with the ability to provide in depth site profile reports as required.
	2. In addition, the Supplier shall monitor consumption / cost / emissions against given parameters including historic data and benchmarks. These benchmarks are to be in accordance with the latest Industry / Government / Customer published custom, practice and data.
	3. The Supplier will work with the client to obtain the necessary site information (e.g. site area) to enable the Performance Indicators to be applied and compared with published standards.
	4. The Supplier shall ensure that Monitoring and Targeting proactively supports the Council and individual properties to identify and target opportunities for reducing consumption and cost. The Principal Mechanical, Electrical and Energy Engineer shall be supported to deliver training and support to site managers. Provision shall be made, where required by the client, for consumption profiling and alarm generation. Monitoring and targeting activity should be tailored to the individual sites in terms of Utility usage.
	5. Particular note should be made that public sector organisations have a major requirement to report extensively on carbon emissions and building performance and the Supplier shall enable this reporting.

*Utility Reporting Procedure*

* 1. The Supplier shall issue reports to North Somerset’s Principal Mechanical, Electrical and Energy Engineer. The reports are to be provided in an agreed manner which could include hard copy (text and/or graphical), CD, electronic and internet.
	2. The format and frequency of the reports is monthly or as agreed with the North Somerset’s Principal Mechanical, Electrical and Energy Engineer. Consideration should be given to the provision of reports using the internet or equivalent.

*Contract Management*

* 1. The Supplier shall provide the North Somerset Councils Principal Mechanical, Electrical and Energy Engineer with a copy of the Utility (Property) Database one month after the Contract start date and shall provide a monthly update in an agreed format by the 10th day of subsequent months. The Supplier shall provide information and data in a format acceptable to Customers.
	2. The requirements contained in this specification are the **minimum requirements.** The Supplier shall develop an operational system based on the Contractor’s own operating practices. The Authority however reserves the right to have editorial control over any report generated.
	3. Any and all contract management meetings with North Somerset will take place at no additional cost. Invoicing arrangements for the service will be agreed with the client.
	4. The Supplier shall, at the expiry of the Contract, hand over to the North Somerset Council Principal Mechanical, Electrical and Energy Engineer all current and historical copies, whether on paper, magnetic or electronic media, of the Utility (Property) Database and reports prepared.
	5. The Supplier shall render every assistance to the Customer to ensure the seamless provision of the services in the event of transfer to a new supplier.

*Energy and Water Policy*

* 1. North Somerset Council is tasked with reducing carbon emissions over the term of the contract. For this reason, the Supplier will be expected to work with North Somerset Council to develop or revise an Energy and Water Policy if required.
	2. The Supplier shall assist the Client to meet its commitments and objectives, including the implementation and monitoring of a Sustainability policy and any other statutory obligations, where this applies. In particular the Supplier shall seek to:-
		1. ensure the conservation of raw materials and minimise the use of unsustainable or finite resources;
		2. reduce waste;
		3. reduce indirect energy consumption and the waste, discharges and emissions arising from its generation.
	3. In addition to this operation, an Environmental Management System (EMS) may exist. Such Environmental Management Systems are to be accredited to ISO 14001, to ensure the effective management of the environmental impacts of their activities and the continual improvement in environmental performance.

*Contractor's Employees and Disclosure*

Tenderers will be referred to the particulars relating to the conduct and competence of the Contactor's employees within the Conditions of Contract. The tenderer will be required to provide an undertaking that all contractors employees which intend to work for the Council, are suitable to do so with regard to potential proximity of children and vulnerable adults on sites. Normally, these employees will have been or will be subjected to Disclosure and Barring Service (previously Criminal Record Bureau checks) *(this kind of disclosure is required for positions that involve regular contact with children or vulnerable adults*), prior to commencing any works with North Somerset Council. The certified undertaking shall remain valid and shall be maintained by the Supplier for the duration of the contract. Details of the requirements are available from the Council or on the HM Government Disclosure and Barring Service (DBS) website.

[https://www.gov.uk/disclosure-barring-service-check/overview#](https://www.gov.uk/disclosure-barring-service-check/overview)