

Folkestone & Hythe District Council

**Service Specification**

**Technical Consultancy Services for**

**Gas**

**Electrical**

**Lifts**

**Water Hygiene**

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# 1. Background

This specification relates to the provision of Mechanical and Electrical Consultancy services whereby the Technical Services Consultant (TSC) will be required to provide onsite inspection-audits, quality assurance and compliance consultancy services for the agreed workstream, all works must be provided with directly employed staff or with written permission for the EMPLOYER if external or subcontractor Labour is to be considered.

This may include both technical and operational contract management support in key compliance areas such as servicing, testing, maintenance and new installations.

The TSC are required within their pricing submission to allow for attending all in person Contract and ad hoc meetings whether at Folkestone & Hythe District Council (FHDC) offices or on MS Teams.

On a monthly basis before each Contract Meeting the TSC will be responsible for completing a full property reconciliation against HRA tenanted properties applicable at the time to each workstream within the Contract, providing written assurance that all certification is compliant. Compliance Administrator will be the FHDC point of contact for this piece of work who will liaise internally with the relevant Compliance Officer.

The reconciliation must be reported and agreed by all at each Monthly contract meeting and minutes recorded accordingly by the relevant Compliance Officer.

***The TSC is responsible for managing to a final conclusion all remedial actions within all workstreams, this includes making sure all remedial actions are rectified to their satisfaction and photographic evidence provided by the Contractor as part of the completion audit trail should a site visit by the TSC not be required****,* ***this is applicable to all workstreams and tasks as laid out in each section below***

***Photographic evidence of all Health & Safety issues discovered as a minimum should be included in the audit report to aid other parties with planning their corrective action****,* ***this is applicable to all workstreams and tasks as laid out in each section below***

*A new compliant certificate provided must be uploaded to the FHDC NEC data management system.*

This will then form the ‘working list for each workstream for each Contractor to work to and charge against. This work must be completed by the TSC and provided to the FHDC Compliance Administrator at least 48 hours in advance of any meeting so they can comment ahead of any meeting.

The tendered submission must be fully inclusive of the requirements of all tender documents.

All tendered costs are to be all inclusive of all relevant works, disbursements, consumables, plant, travel, no access, overheads and profit.

***For the first 3 years of this Contract, no CPI increase*** will be applicable to this Contract, the EMPLOYER may at their own discretion discuss any increase should the Contract be extended or in exceptional circumstances at the EMPLOYERS discretion be agreed beforehand.

The background to this tender specification scope of works is as detailed as it can be at the time of going to tender, agreements maybe discussed and agreed further at the mobilisation stage.

***Quantities and percentages within any area of the tender package including the costing matrix are estimates and does not confirm or make the EMPLOYER liable or committed to these figures,*** percentages and properties totals of works to be completed could go up as well as down and will be adjusted as part of the monthly Contract meeting.

## 1.1 Scope of Consultancy & Technical Services

The Consultants appointed under this contract will be required to provide Pre/Post inspections Onsite/Desktop Auditing and Quality Assurance Compliance services, including but not limited to:

* Gas (Domestic/Commercial)
* Electrical Services (Domestic / Communal)
* Communal Fire Alarm / Emergency Lighting/Communal Lighting
* Lifts (Passenger/Mobility)
* Water Hygiene (Risk Assessment/Water Hygiene Monitoring)
* Renewables
* Desk Top and intrusive Audits by the Consultant in respect to service & maintenance and servicing for Health & Safety compliance and to identify and reduce total cost across the contractor supply chain.
* On site ‘work in progress’ Inspections with Contractor’s engineers to appraise workmanship standards, H&S, technical and regulatory compliance.

Consultants shall work with contractor's and ensure H&S compliance through optimum use of audit inspection resource.

**GAS**

* Domestic Desktop Audits 100%
* Domestic Gas Servicing - on site audits and reports 10% of completed servicing.
* Post repairs inspections 10%
* Auditing of new installations up to 100%
* Commercial Gas Desktop Audit of PPM visits and certification – 100% (currently 24)
* Commercial Gas - on site audits and reports 100% of completed PPM spread over the Annual Program (currently 24)
* Any other requests by the EMPLOYER as requested – At agreed Ad hoc rates.

**ELECTRICAL**

* Domestic EICR Desktop Audits – 100%
* Communal EICR Desktop Audit 100%
* Domestic On Site EICR Technical audits 10%
* Communal On Site EICR Technical Audits 10%
* Any other requests by the EMPLOYER as requested – At agreed hourly rates.
* Electric Heating Upgrades 100% Desktop of all new installations / 10% Onsite Quality Inspections.
* Fire Alarm Certification Desktop Audit 100%
* Fire Alarm on Site Technical Audit 10%
* Emergency Lighting Desktop Audit 100%
* Emergency Lighting on Site Audits 10%
* Any other requests by the EMPLOYER as requested – At agreed Ad hoc rates.

**LIFTS**

* Lift Servicing and PPM documentation Desktop Audit / Loler Desktop Audits – 100%
* On site Technical Servicing / PPM audits 50% Spread over the Annual Program.
* Fully manage all remedial actions to full completion and post inspection. (All works over £500 in person under £500 Contractor to provide completion evidence and photos for sign off.
* Any other requests by the EMPLOYER as requested – At agreed Ad hoc rates.

**LEGIONELLA**

* Water Hygiene monitoring on site audits a minimum of 20% - Spread over the Annual Program.
* Desktop Audit - L8 RA 100%
* Any other requests by the EMPLOYER as requested – At agreed Ad hoc rates.

**RENEWABLES –**

Where Applicable and as defined in the scoping document – Quantities will be agreed at mobilisation.

* Solar – 100% Desktop of all new installation / 10% Onsite Quality Inspections
* Air and Ground Source Heat Pumps - 100% Desktop of all new installation / 10% Onsite Quality Inspections.

**General Requirements**

The following requirements are deemed to be included within the consultant’s tendered rates.

## 1.2 IT Provision

As Part of the Tender process, the successful applicant will be required to provide a platform that fully integrates documents with our internal system.

Documents defined as 'Satisfactory' / ‘Pass’ certificates only - via your internal QC process – must be available in real time - via a secure network platform provided by yourselves - such that these documents can be exchanged electronically in a timely fashion with our document repository.

Additionally, it is vitally important that the document naming convention follows a clearly defined ruleset and that summary information for any processed documents is also provided in the form of a metadata file.

For the automated loading of certificates, the supplier must provide a metadata file which lists the certificates to be loaded and should have the following columns:

"Propref","doctype(we need to confirm this with each supplier)","service\_name","file\_date","status","document\_name","Certificate\_date"

E.g. "SDCPRO160120Z01200","AGASCERT","HO","29-07-2024","1","SDCPRO160120Z01200\_LGSR\_26-07-2024.pdf","Certificate date 26-07-24"

***Example of the way a PDF document needs to be titled, substitute Certype for LGSR or whatever the certificate type is EG: EICR etc. making sure all under spaces are included.***

The pdfs need to be named in the format: **UPRN\_Certtype\_DD-MM-YYYY.pdf**

(date also being the certificate date)

Historic information relating to processed documents must be retained and provided as and when required. A full audit trail of all processing and the passing of data must also be provided on an on-going basis. A clear differentiation must be made by document type and between current and historic documents.

The cost for this must be borne by the applicant.

The consultants shall be equipped with mobile handheld devices to enable the recording of all work (on site or desktop), including relevant photographic evidence when on site and transmitted directly to the consultant’s IT system.

Once certification from the Contractors is audited and any remedial actions corrected, and a new certificate issued by the Contractor the consultant shall have and maintain suitable and effective IT management system that will enable direct links with all appointed workstream Contractors to the EMPLOYER’s data management system (NEC / Northgate) in the form of electronic file transmission (SFTP – secure file transfer protocol)

The TSC shall provide monthly a year-to-date report, the service data shall be provided via a suitable web-portal service to cover all data within monthly performance reports that clearly demonstrate the service level performance of the stated contractors with photographic evidence of findings to enable the effective management of actions resulting from the consultant’s activities.

The TSC must provide FHDC and its Contractors with a web-portal to access the service data in order to manage any remedial actions highlighted by the audits.

All information provided in the web-portal shall also be fully downloadable in a CSV file format for offline reporting and forwarded to FHDC as and when requested, timings will be agreed at mobilisation.

Reports shall provide year to date and in month results with a priority rating assessment to easily identify underperforming contractors/Contractors as appropriate to the scope of the contract.

At the end of the Contract, the consultant will provide in a form agreed a complete data set and all compliant certification appertaining to each workstream for the duration of the Contract at no additional cost to the EMPLOYER.

The consultant shall maintain an on-line web-portal for the EMPLOYER and Contractors to access the results of the TSC audits respond to remedial actions and retrieve performance information.0

## 1.3 Auditors

Only qualified Auditors should be assigned to this contract, shall hold relevant Accredited Certificate Scheme qualifications. It is the consultant’s responsibility to prove that their Auditors have the required competencies to perform the required services.

The minimum qualifications required for undertaking this contract are as follows or the current equivalent:

|  |
| --- |
| Level 3 City & Guild - Inspection, Testing and Certification of Electrical |
| Installations |
| Level 3 City & Guild - Requirements for Electrical Installations |
| (BS7671:2008) |
| Level 3 City & Guild – Electro technical Technology Installation |
| (Buildings and Structures) |
| ECA – Part P Competent Person Scheme |
| ISO.IEC 17020 UKAS Accreditation |
| BS 7671 IET Wiring Regulations BS7671\;2018 18th Edition |
| MSC Certified / Level 3 Award in Air Source Heat Pump Systems (non-refrigerant Circuits) |
| OFTEC Registration/Qualified Operative |
| Gas Safe – ACS / Gas Safe Registration |

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## 1.4 Audit Protocol

Whilst on site the Technical Consultant undertaking audits should:

1. Complete the required audit.
2. Only carryout minor system and appliance adjustments, to leave the system and appliances operational.
3. Inform the EMPLOYER on discovery of a ‘Immediately Dangerous’ situations or installation, isolate from the supplies and issue a warning notice to the EMPLOYER and the resident.
4. On discovery of any RIDDOR advise the EMPLOYER immediately, complete the online form, record the RIDDOR notification reference number and send a copy of the report to the EMPLOYER.
5. Auditors will return appliances and installations to full working condition following an audit. Where this is not possible and further work is required, this will be carried out by the EMPLOYER’S appointed contractor at no charge to the Consultant.
6. Any near misses and safeguarding issues shall be reporting to the EMPLOYER (Housing Compliance) immediately via housing.Compliance@folkestone-hythe.gov.uk or the relevant workstream officer.

## 1.5 Post Inspection Audit Selection Criteria

The consultant’s audit selection must be structured taking account of geographical areas and the Contractors engineers employed on the contract to ensure a representative sample is achieved.

This selection will need to be tailored each month to allow for the incorporation of a ‘risk assessed’ selection criteria based on the results of previous audits, e.g. focus on underperforming engineers.

***The TSC shall then be responsible for ensuring that the Contractor provides photographic evidence of all its completed remedial actions, if unavailable from the Contractor this evidence must be provided by TSC, no additional charges will be allowed for return site visits.***

## 1.6 Planning & Appointments

The consultants shall plan its audit schedule and send an appointment letter, text message or Email to residents at the selected addresses no later than one week before the scheduled visit.

The letter shall include the purpose of the visit, the date and time of appointment (AM/PM), name of the auditor visiting and a contact number for the relevant EMPLOYER officer to verify the visit. The final text of the standard appointment notification letter shall be agreed with the EMPLOYER.

2.2 The consultant will send appointment letters or text messages in excess of the percentage (%) audit requirement to facilitate 100% access performance. Where the number of ‘no access’ events reduce the access performance below 100% the auditor with agreement from the EMPLOYER will make appointments by telephone.

2.3 Consultant’s tendered rates should include for aborted and no-access calls, the employer will not be liable for any additional charges.

1.7 Asset Records (Certificate Validation only)

The consultant will be expected to record from the Contractors certificates and maintain an appliance and equipment asset register of all workstreams within the Contract; this will include Smoke/Heat and CO detectors from the Gas and or Electrical Contractors

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## 1.8 Corrective Action – Management

The consultants are required to manage and monitor the corrective action identified from their Safety Certificate Audit & Validation work and Post Inspection Audits via their web portal system. Reports should be issued to the Contractor in live time detailing all corrective actions required, priority and the target date for completion. The consultant is to provide direct access via a web-portal or similar to their Audit data, in order that Contractors can access records and confirm completion of corrective actions and submit supporting evidence (e.g. photos).

Reports provided at the monthly Operational meetings should list all outstanding action; the detail should include when the action was first recorded and the target date for completion.

This activity will be deemed to be inclusive within the contract rates supplied by Tenderers.

## 1.9 Reporting

As part of the mobilisation period the consultants shall provide in an agreed format its service data via a suitable web-portal or equivalent and further present at frequencies to be agreed management and performance reports that clearly demonstrate the service level performance of Contractors and enable the effective management of actions resulting from the consultant’s activities.

Reports should provide year to date and in month results with a priority rating assessment to easily identify underperforming service engineers.

Provision of reports for each Contractor pertaining to their Contract delivery performance:

1. Servicing Compliance, completion of Service Program within Contractual timescale Volume of Responsive Repairs received, volume of Responsive Repairs completed first time or right first-time fix.
2. Ongoing Contract Cost expenditure, value of savings, and forecast spend for the programme year.
3. Volume of resident appointments made, number attended on time or not.
4. Resident/customer satisfaction

Provision of reports for each Contractor pertaining to Safety Certificate Audit &

Validation should include:

1. Data reports for upload to the EMPLOYER’s management system
2. Summary of service performance with trend analysis as required.
3. Individual engineer performance report (on request)
4. Live remedial action reports

Provision of reports for each Contractor pertaining to Post Inspection Audits should include:

1. Data for upload to the EMPLOYER’s management system
2. Summary of service performance with trend analysis as required.
3. Individual engineer performance report (on request)
4. Individual property audit reports with photographic evidence of identified Health & Safety issues.
5. Live remedial action reports

The reports required should:

1. Provide a summary detailing each individual property surveyed that month.
2. Detail any areas of regulation non-compliance.
3. Clearly identify ‘At Risk’ and ‘Immediately Dangerous’ situations identified.
4. Detail findings of all elements inspected with pass/fail rates to allow benchmarking of engineers.
5. Provide graphs detailing a summary of the Contractors engineer performance.
6. Include identified fault analysis.
7. List corrective actions required.

***The consultant will be required to reconcile each month the properties recorded in their management system with the EMPLOYER HRA Tenancy records and Contractor records. Any variation discovered between the record sets should be reported and appropriate corrective action taken in conjunction with the Compliance Team.***

## 1.10 Meetings

Contractor Operational and Consultant Review meetings in respect of the Contractor and Consultant’s service performance shall be held at mutually acceptable frequencies and venues with the EMPLOYER these will be at the EMPLOYER’s head office in Folkestone unless otherwise agreed in writing by the EMPLOYER. All the Consultant’s costs must be allowed for within the tendered rates.

An agenda for such meetings will be prepared, amended as necessary and agreed by both parties.

The Consultant shall also attend, contribute and give reports to monthly Operational Contract Progress Meetings and quarterly Core Group meetings and other ad-hoc meetings as may be required.

## 1.11 Measurement of Consultants Performance

**Key Performance Indicators (KPIs)**

The Consultant’s performance will be measured and several KPI’s pertaining to the

services supplied will be agreed at the onset.

The preliminary areas for measurement which the Consultant is expected to provide supporting information and reports will include but are not limited to:

• Time taken to process and validate completed certification

• Time taken from certificate completion to site audit

• % of Audits completed against target volume

• % of Audits & PPM visits completed on programme

• Timely delivery and accuracy of all reports

For further detail please see Appendix A and Question 3 – The answers required within these documents are required for all workstreams within the tender package.

## 1.12 Reporting

All monthly reports for each workstream will be forwarded to the relevant Compliance Officer within 5 working days of the preceding month (30th April 2025 will be required by 7th May 2025 and so on).

TSC will, as part of the Quality submission provide templates of each workstream report (non-scored) and a brief meaningful overview of the contents of the report and how this will be managed (scored).

# 2 GAS

## 2.1 Desktop Audit of LGSR, per certificate

The consultant shall Audit and Validate all Gas, Oil, Solid Fuel, Electric & Renewable Heating Certificates submitted by the Service Provider within two working days of receipt of the certificate(s). The audit should include the following checks:

* the date on which the appliance and/or flue was checked.
* the address of the premises at which the appliance and/or flue is installed.
* the landlord details are correct.
* the description of each appliance and/or flue together with a record of its location
* the defects identified.
* the remedial action taken.
* the name and signature of the individual who completed the Landlord Safety Record
* the inspection carried out has been completed in accord with the relevant regulations.
* the inspection carried out has been completed in accord with the FHDC’s contract condition.
* the registration number of the individual who completed the record or the employer.

Where a previous record is held by the consultant:

* the appliances listed on the current certificate should be reconciled with the previous record, if different seek to verify the change and or request a revisit by the Service Provider

During the process, the consultant is expected to record the salient details recorded on the Landlord Safety Record (certificate), where a non-compliant certificate is discovered a notice with reason for rejection should be sent immediately to the Service Provider for rectification.

## 2.3 Gas Domestic Audits & Reports

The consultant shall complete each month Post Inspection Audits of the FHDC’s Annual Domestic Gas, Oil, Electric & Renewable Heating Servicing programme completed by the Service Provider in the preceding month, a percentage sample shall be agreed with the FHDC, and the audits should include the following intrusive checks:

* Review and validation of the Landlord Safety Record (salient point check)
* Confirm all heating appliances present within building.
* Technical inspection (see below)
* Record remedial works not listed or incorrectly identified on Landlord Safety Record
* Complete a Technical Inspection appropriate for the heating system, including:
* Test and safety inspection of all landlord appliances.
* Check all safety devices are operational.
* System operation
* A tightness test as required.
* Full inspection of the visible flue and operational test of the entire flue system
* Check and record the Heat Input
* A combustion analysis of the CO to CO2 ratio
* Inspection of all appliance ventilation arrangements
* Visual inspection of the associated electrical installation
* Meter installation
* Verification of condemned and Obsoleted equipment

***Photographic evidence of all Health & Safety issues discovered as a minimum should be included in the audit report to aid other parties with planning their corrective action.***

## 2.4 Post Repair/Breakdown Inspections

The consultant shall maintain sufficient resource to facilitate an audit of Heating System Repair; the audit should include the following checks:

* Assess the overall quality of the repair work.
* Assess effectiveness of completed work.
* Examine quality of parts fitted.
* Determine if any works are outstanding.
* Confirm if repair/installation is legislative compliant.

## 2.5 Gas Non-domestic and Communal Site Audits & Reports

The consultant shall complete each month Post Inspection Audit of the FHDC annual Gas, Oil, Electric & Renewable Heating Commercial Servicing programme completed by the Service Provider in the preceding month, a percentage sample shall be agreed with the FHDC, and the audits should include the following intrusive checks:

* Review and validation of the Landlord Safety Record (salient point check)
* Confirm all appliances present within building.
* Technical inspection (see below)
* Record remedial works not listed or incorrectly identified on Landlord Safety Record

Complete a Technical Inspection appropriate for the heating system, including:

* Test and safety inspection of all appliances.
* Check all safety devices are operational.
* A tightness test (if issue suspected)
* Full inspection of the visible flue and operational test of the entire flue system
* Check and record the Heat Input
* A combustion analysis of the CO to CO2 ratio
* Inspection of all appliance ventilation arrangements
* Visual inspection of the associated electrical installation
* Meter installation
* Confirm the appliances and system are operational.
* Valve and fuel line diagram present and current.
* Controls / fire / smoke detection / plant room lighting
* O&M Manual present and current
* Logbook entries
* System and Service report
* Health & Safety Visual assessment of Plant Room

## 2.6 Annual Planned Preventative Maintenance (PPM) visits based on programme.

In addition to above, the consultant shall visit each commercial plant room in accordance with the service providers PPM schedule, to assess the condition, record the finding and report any remedial works required or regulatory non-compliance. The consultant shall then be responsible for ensuring that the Service Provider completes the identified works and provided photographic evidence of its completion either from the Contractor or if unavailable provided by themselves.

## 2.7 Auditing of new Installations

The consultant when instructed complete Post Inspection Audits of Reactive or Planned Gas or Oil Boiler/System Installation, the audit should include the following intrusive checks:

* Review and validation of the Landlord Safety Record (salient point check)
* Confirm the appliances present.
* Technical inspection (see below)

Complete a Technical Inspection appropriate for the heating system, including but not limited to:

* Confirmation that the installation has been completed to the manufacturer’s instruction / design / specification.
* Test and safety inspection of all appliances.
* Check all safety devices are operational.
* A tightness test (if issue suspected)
* Full inspection of the visible flue and operational test of the entire flue system
* Check and record the Heat Input
* A combustion analysis of the CO to CO2 ratio
* Inspection of all appliance ventilation arrangements
* Visual inspection of the associated electrical installation
* Meter installation
* Onsite System water analysis
* Benchmark book.
* Making good has been completed.
* Details of remedial actions required.
* Legislative compliancy and Building Regulations
* Check the O&Ms and comment.
* List all snagging with timeline for completion and liaise with the Contractor until remedial/snagging is completed.
* Photographic evidence of all completed works must be provided.

## 2.8 Plant room Condition Surveys – Additional Works as and when agreed with the EMPLOYER in writing.

The consultant will be expected to carry out when instructed Plant Room Condition Surveys and submit a written report in an agreed format and a summary report of all plant rooms surveyed within a spreadsheet. The summary spreadsheet should include an overview of the findings along with budget costs, forward costs plans and options appraisals.

The survey and resulting reports should include but not limited to:

* + Boilers
	+ Burners
	+ Flues & Ventilation
	+ Pumps & Valves
	+ Calorifiers
	+ System controls
	+ CHP
	+ Expansion Vessels

## 2.9 Carbon Monoxide (CO) Alarm Activation Fumes Investigation and Report

***Only to be used with FHDC written permission, these investigations will be costed separately via the ad hoc rates on a case-by-case bases.***

The consultant shall maintain sufficient resource to facilitate a Carbon Monoxide (CO) Alarm Activation Fumes Investigation and Report (to CMMDA1/BS 7967 standard) within 24 hours of receiving an instruction, the investigation and report should:

* Confirm attendance of the Emergency Service Provider
* Details of alleged CO detector activation
* Visually inspect installation.
* Visually inspect all CO detectors for operation and dates
* If no CO fumes present and all appliances found to be operating correctly reinstate gas supply carrying out all necessary tests in accordance with the required standard
* As necessary complete further tests as required in accordance with the required standard.
* Record all findings and complete documentation on web portal system.

# 3. ELECTRICAL

## 3.1 Electrical Communal Site Audits & Reports

The consultants shall complete each month Post Inspection Audits the EMPLOYERs communal EICR programme completed by the Contractor in the preceding month, a percentage sample shall be agreed with the EMPLOYER at the time of mobilisation and the audits should include the following intrusive checks:

* Check all safety devices are operational in times required (if authorised to power down)
* Full inspection of accessible accessories, operational test and identification labelling
* Confirmation of sample earth loop impedance readings are in acceptable range.
* Inspection of all Earth Bonding visually or verified by test if necessary.
* Condition of electrical supply where accessible at the time of inspection
* Access the overall quality of the repair work.
* Determine if any works are outstanding.
* Confirm if works represented VFM and all SOR’s adhered to
* Confirm works were completed as specified.
* Confirm if repair/ installation is legislative compliant.
* Collect residents’ satisfaction feedback.

## 3.2 Post-Repair Inspections

The consultants shall maintain sufficient resource to facilitate an audit of Heating System Repair within 10 working days of receiving an instruction; the audit should include the following intrusive checks:

* Assess the overall quality of the repair work.
* Assess effectiveness of completed work.
* Examine quality of parts fitted.
* Determine if any works are outstanding.
* Confirm if repair/installation is legislative compliant.
* Carry out 26(9) checks on the gas appliance where necessary to deem the appliance has been repaired correctly.

## 3.3 Desktop Audit of EICR/EIC, per certificate

A full 100% desk -top review and validation of the sample EICR/EIC provided by the Contractor. The audit must include the following checks.

* The date on which the EICR/EIC was checked.
* The address of the premises for which the EICR/EIC was provided for.
* The landlord details are correct.
* The defects identified.
* The remedial action taken.
* The name and signature of the individual who completed the EICR/EIC Record
* The inspection carried out has been completed in accord with the relevant regulations.
* The inspection carried out has been completed in accord with the Procure Public Ltd Group’s contract condition.
* The registration number of the individual who completed the record or the employer.

## 3.4 Service Inspection Audits- Electrical

Electrical Audits & Reports

The consultants shall complete each month Post Inspection Audits of the EMPLOYERs EICR programme completed by the Contractor in the preceding month, a percentage sample shall be agreed with the EMPLOYER and the audits should include the following intrusive checks:

* Check all safety devices are operational in times required (if authorised to power down)
* Full inspection of accessible accessories, operational test and identification labelling
* Confirmation of sample earth loop impedance readings are in acceptable range.
* Inspection of all Earth Bonding visually or verified by test if necessary.
* Condition of electrical supply where accessible at the time of inspection
* Access the overall quality of the repair work.
* Determine if any works are outstanding.
* Confirm if works represented VFM and all SOR’s adhered to
* Confirm works were completed as specified.
* Confirm if repair/ installation is legislative compliant.
* Collect residents’ satisfaction feedback,

The Electrical Inspections are to be undertaken by individuals that satisfy the following Qualification Criteria:

* Suitable Level 3 Electrical Installation Technical Qualification. This to be preferably evidenced as part of Apprenticeship Completion Documentation
* Level 3 Award in the Requirements for Electrical Installations BS 7671 Current Edition
* JIB Recognised Level 3 Qualification in Inspection and Testing
* Asbestos Awareness Training Completion
* Electro Technical Certification Scheme (ECS) Approved (Preferable)

Individuals undertaking the Electrical Quality Control Inspections are to be in possession of the following equipment to execute the task:

* Calibrated Test Kit
* Calibrated Safe Isolation Equipment comprising of Proving Unit, Voltage Indicator, Suitable Locking Off Devices and Durable Signage
* Calibrated Torque Tool
* R2 Continuity Wander Lead
* Suitable Insulated Access Equipment

Information as listed above along with required Risk Assessments and Method Statements are to be issued to the EMPLOYER prior to any works commencing and confirmed adequate.

## 3.5 Intrusive Post Inspection - Upgrade or Installation Work Site Audit

Must incorporate Visual Inspection executed against IET Wiring Regulations (Current Edition)

Must incorporate Installation Testing inclusive of:

* External Earth Fault Loop Impedance
* Prospective Fault Current
* Continuity Testing of Main Protective Bonding Conductors
* Sample Final Circuit Testing (Minimum of 3 Final Circuits) Incorporating:
* Continuity of Protective Conductors
* Ring Final Circuit Continuity (If applicable)
* Insulation Resistance
* Polarity
* Earth Fault Loop Impedance
* Residual Current Device Testing
* AFDD Testing
* Confirmation that the installation has been completed to the manufacturer’s instruction / design / specification.
* Compliance with all BS and Building Regulations
* Check the O&Ms and comment.
* List all snagging with timeline for completion and liaise with the Contractor until remedial/snagging is completed.
* Photographic evidence of all completed works must be provided.

## 3.6 Documentation / Certification Review

Inspections to be electronically recorded and available for review within 30 minutes of execution.

The Inspections are to be accessible via an On-Line Portal that permits both EMPLOYER and Contractor access.

Where issues are identified following an Inspection that require Corrective Actions, the EMPLOYER and/or Contractor is to be informed immediately by a notification linked to the On-Line Portal.

Actions are to be recorded and ‘Closed Off’ via the Portal and include requirement for details on ‘Lessons Learned’ by the Contractor following the occurrence.

The Electrical Quality Control Inspections are to include a KPI score and Pass/Fail outcome. In addition, each of the following core areas are to be individually scored to maximise feedback and identify areas for improvement by the Contractor.

* Inspection
* Installation Testing
* Documentation
* Customer Satisfaction

In addition, any Inspection Non-Compliances identified are to be recorded with the relevant Regulation Reference highlighted.

The following Summary Reports are to be available via the On-Line Portal in order to assist both EMPLOYER and Contractor to monitor performance and highlight any areas of concern that require improvement and continuous monitoring:

* Summary Monthly KPI Outcome
* Performance KPI by Contractor
* Performance KPI by Engineer
* Most Re-Occurring Non-Compliances by Contractor
* Most Re-Occurring Non-Compliances by Engineer
* Benchmarking Reports by EMPLOYER and Contractor

## 3.7 Task: Desktop Audit (DA)

Requirements:

* To undertake Electrical Documentation / Certification Review executed against the guidelines as laid in EMPLOYER Technical Protocol where applicable to confirm compilation with both Competent Person Scheme Requirements and Industry Best Practice.
* Findings to be recorded in Spreadsheet format broken down page by page with any specific issues.
* Where required any documents requiring re-issue or queries addressing are to be highlighted to both EMPLOYER and Contractor.
* Liaise with Contractors directly to discuss findings and address any queries or issues as they occur.

# 4. Lifts

The consultants shall complete on site Post Inspection Audits of the EMPLOYER’s lift servicing on a quarterly basis unless agreed otherwise in writing by the EMPLOYER.

## 4.1 Service Overview

* Passenger Lift Audits & Reports 10% of portfolio (Contractor Servicing)
* Mobility Lift Audits & Reports 10% of portfolio.
* LOLER report audit on site (Zurich Remedial Check)
* "Post-Repair" Lift Inspections

## 4.2 Servicing Inspection Detail

Areas for inclusion of an on-site service inspection are as follows but not limited to:

* The log card up to date and correctly filled in.
* Motor room lights good, clean working order normal & emergency
* Is the motor room clean and tidy - Any suspected Asbestos.
* Correct signage inside motor room - Hand winding/ Electrical
* Is the controller clean and tidy and doors secured?
* Are the floor levels within an acceptable tolerance?
* Doors open/close correct speeds & stopping on limits correctly.
* Is the door open button working.
* Is the safety edge working?
* Is the alarm bell working/Auto Dialler?
* Car lights working / inacceptable condition / Emergency lighting.
* Are the car position indicators working (in car and on landings)
* Are the call acceptance lights working (in car and on landings)
* Is the lift hitting any shaft components whilst in travel?
* Are the car & landing doors running smoothly?
* Is the pit clean and tidy/Equipment in good condition?
* Are the shaft lights working?
* Are the ropes in good condition/Rope termination, correct?
* Car / counterweight guide shoes in good condition & oil pots full
* Is all door furniture in good condition & order?
* Landing entrance/Landing toe guards & cills in good condition
* Is the Governor rope in good condition / Rope termination good?
* Are the tape head / magnets in good condition?
* Are the shaft switches in good condition?

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## 4.3 Loler

The consultant is to undertake a monthly 100% desktop review of all LOLER reports received for both passenger and mobility lifts.

At least 10% of sites audits of service visits by the LOLER Inspector must be attended to confirm that inspections/audits comply with all current regulations and should any further issues be noted these must passed back to the Contractor for them to rectify these must be then reinspected by the TSC or have photographic evidence of their completion to the satisfaction of the TSC

High risk actions must be notified to the EMPLOYER immediately and action taken to make sure the risk is managed, and any works rectified to the satisfaction of the Consultant and EMPLOYER as quickly as possible.

## 4.4 Intrusive Post Inspection - Upgrade or Installation Work Site Audit

Complete a Technical onsite Inspection appropriate for lift installation / upgrade works carried out, including but not limited to:

* Confirmation that the installation has been completed to the manufacturer’s instruction all design, specification and scope of works documentation.
* Compliance with all BS and Building Regulations.
* Check the O&Ms and comment.
* List all snagging with timeline for completion and liaise with the Contractor until remedial/snagging is completed.
* Photographic evidence of all completed works must be provided.

# 5. Water Hygiene/ L8 Audits and Reports

The consultants shall complete each month Post Inspection Audits of the EMPLOYERs Legionella programme completed by the Contractor in the preceding month to, a percentage sample shall be agreed with the EMPLOYER in order to ensure the Contractors are managing legionella risk in accordance with Approved Health and Safety Code of Practice (L8).

The EMPLOYER will be required to review of the legionella risk assessments carried out by the Contractor as well as confirming all remedial actions and monitoring is taking place and is correctly being managed and reported by the Contractor.

The audits should include the following intrusive checks (but not limited too):

* 100% post inspection of works over £500.00 works such as tank replacements, Mains conversions etc.
* At least 10% onsite audits of all works under £500.00 as part of this site visit TSC will ensure that the LRA is suitable and sufficient and in line with the requirements of ACOP L8.
* 100% Desktop audit is required for all L8RA, should any issues be noted these must passed back to the Contractor for them to rectify these must be then reinspected by the TSC or have photographic evidence provided by the Contractor to the acceptance of TSC and FHDC.
* A bi-monthly on-site visit must be allowed for to check, monitor and report back on to FHDC Legionella Officer in a format to be agreed. Should any issues be noted these must passed back to the Contractor for them to rectify these must be then reinspected by the TSC
* The completed audit report is to be issued to the EMPLOYER electronically. It is the responsibility of the TSC to make sure all remedial actions are completed to their and FHDC satisfaction and are compliant.
* No additional charges will be allowed by TSC for return site visits should any of the reports or photographic evidence not be to acceptable level required by FHDC.

## 5.1 Desktop Audit of Water Hygiene Exclusion Certificates

* 10% desk-top review of all low-risk sites where no legionella risk assessment is required, and an exclusion certificate has been provided by the contractor. Ensure that the sites in question are in fact low risk and have no stored hot/cold water on site and these have been signed off by an Assessor.
* Review of temperature testing visits carried out by contractor to the EMPLOYER’s sites on a monthly basis. 20% check of temperature monitoring programme to be carried out on an annual basis. The EMPLOYER will specify on site list.

## 5.2 Intrusive Post Inspection - Upgrade or Installation Work Site Audit

Complete a Technical onsite Inspection appropriate for the Water Hygiene installation / upgrade/remedial works carried out, including but not limited to:

* Confirmation that the installation has been completed to the manufacturer’s instruction all design, specification and scope of works documentation.
* Compliance with all BS and Building Regulations.
* Check the O&Ms and comment.
* List any snagging with timeline for completion and liaise with the Contractor until remedial/snagging is completed.
* Photographic evidence of all completed works must be provided.

## 5.3 Regulations

The services shall be undertaken to the entire satisfaction of the EMPLOYER and in accordance with all relevant and current statutory instructions, regulations and Codes of Practice and all subsequent amendments, in particular with regard to the following:

* The IEE Wiring Regulations for Electrical Installations 17th Edition – BS7671:2008
* Electricity at Work Regulations 1989
* The Management of Health and Safety at Work Regulations
* RIDDOR
* COSHH Regulations
* Regulations for the Control of Asbestos at Work
* Environmental Protection Act 1990
* Pollution Prevention and Control Act 1999
* Regulations under the Factories Act
* Building Regulations (Part L)
* ACOP and Guidance L8: The control of legionella bacteria in water systems
* Health and Safety at Work Act - 1974
* HSE Booklet L56 Safety in the Installation and Use of Gas Systems and Appliances (Approved Code of Practice and Guidance)
* Control of Asbestos Regulations 2012
* HSE Guidance in regard to Asbestos including HSG264, HSG247 and HSG210
* Plus, any other Legislative Requirements Applicable

# 6.0 Renewables

All estimated service level requirements are within the pricing document, below are a basic guide to inspection requirements however Consultants will be expected to provide their own inspection reports for the EMPLOYER’s comment as part of the mobilisation process.

## 6.1 Air Source Heat Pump Maintenance

Tasks to be checked and evidenced during an annual site inspection are as follows but not limited to:

* Check installation against Manufacturer’s Instruction
* Make sure the Contractor has carried the following but not limited to and have provided evidence and complaint certification.
* Inspect ducts, filters, blower, and indoor coil for dirt and other obstructions.
* Diagnose and seal duct leakage.
* Verify adequate airflow by measurement.
* Verify correct refrigerant charge by measurement.
* Check for refrigerant leaks.
* Inspect electric terminals, and, if necessary, clean and tighten connections, and apply nonconductive coating
* Lubricate motors and inspect belts for tightness and wear.
* Verify correct electric control, making sure that heating is locked out when the thermostat calls for cooling and vice versa.
* Verify correct thermostat operation.
* Record any issues, report issues back to the EMPLOYER/Contractor and follow rectification through to satisfactory completion.
* Provide photographic evidence of all assets and data plate information.

## 6.2 Ground Source Heat Pump Maintenance

Tasks to be checked and evidenced during an annual site inspection are as follows but not limited to:

* Check installation against Manufacturer’s Instruction
* Make sure the Contractor has carried the following but not limited to and have provided evidence and complaint certification.
* Samples of thermal transfer fluid should be taken, and the concentration of the antifreeze solution measured using a refractometer.
* Check and record the correct concentration of antifreeze solution and adjust to Manufacturer’s requirements, is important as it will stop the system from freezing and prolong the lifespan of the circulation pump. The bacterial agent will ensure no bacterial growth occurs, thus further increasing the lifespan of the antifreeze.
* The manifold should be thoroughly inspected, checking that any insulation is still in good condition and the components are still fit for purpose. Manifolds should be checked for strain on pipework connections caused by ground settlement. It can take up to 12 months for any disturbed ground to fully settle and if any pipework is under strain this must be remedied.
* Ground array manifolds on the ground collector can suffer from condensation due to the low temperatures of the thermal transfer fluid, which if not properly controlled can cause damage.
* The pressure of the thermal transfer fluid within the ground array must be checked and increased if required. The recommended pressure is above 2 bar.
* Record any issues, report issues back to the EMPLOYER/Contractor and follow rectification through to satisfactory completion.
* Provide photographic evidence of all assets and data plate information.

## 6.3 Heating Distribution – in conjunction with ASHP or GSHP Installation visits

Tasks to be checked and evidenced during an annual site inspection are as follows but not limited to:

* Check installation against Manufacturer’s Instruction
* Make sure the Contractor has carried the following but not limited to and have provided evidence and complaint certification.
* Check the inhibitor levels and ensure no corrosion or degradation has occurred.
* Encourage your customer to regularly clean the convector fins of their radiators with a long-handled radiator brush or the nozzle attachment of a hoover.
* Make sure that all pump valves and actuators on the system are functioning correctly.
* Ensure all room stats and programmers are operating correctly and are programmed correctly.
* If any components require a battery to function, check that the battery has charge.
* If the system has filters or a Magna Clean, check that this is cleaned and/or serviced.
* Check the pressure of the ground and heating system.
* Perform a gas charge pressure check on the expansion vessel.
* Check antifreeze concentration and health.
* Record any issues, report issues back to the EMPLOYER/Contractor and follow rectification through to satisfactory completion.
* Provide photographic evidence of all assets and data plate information.

## 6.4 Solar Panels

Tasks to be checked and evidenced during an annual site inspection are as follows but not limited to:

* Check installation against Manufacturer’s Instruction
* Make sure the Contractor has carried the following but not limited to and have provided evidence and complaint certification.
* Water: Using pure and high-quality water, preferably distilled or deionized, is recommended to avoid the formation of mineral stains or deposits on the surface of the solar panels.
* Detergent: Mild detergents are compatible with the materials used in the panels such as glass and protective coatings. Specific detergents for PV panels can also be used. Harsh chemicals such as abrasive cleaners or solvents should be avoided as they may corrode the materials, scratch the photovoltaic cells, or leave residue.
* Brushes, sponges, and cleaning tools: Soft bristle brushes can be used to remove dirt from solar panels. Try not to press too hard to avoid scratching or damaging the surface. If you use sponges or cloths, choose microfiber as they remove dirt and debris without damaging the surface of the solar panels.
* Extendable handle: PV installations are usually located on roofs, so it's convenient to use a telescopic pole or extendable handle to reach higher and more difficult areas. Safety is key to prevent possible accidents. If you can't clean the solar panels yourself, hiring a specialized professional service is recommended.
* Record any issues, report issues back to the EMPLOYER/Contractor and follow rectification through to satisfactory completion.
* Provide photographic evidence of all assets and data plate information.