

**SPECIFICATION**

**TENANT ENERGY ADVICE SERVICE**

PROCONTRACT PORTAL REFERENCE:

**Specification**

**1 Glossary of Terms**

|  |  |
| --- | --- |
| Abbreviation | Meaning |
| BCC | Bristol City Council |
| TEA | Tenant Energy Advice service |

**2. Introduction**

2.1 Bristol City Council’s Landlord Services service maintains and manages 27,000 social housing homes. Our tenants (appendix 2) are generally amongst the poorest households (over 75% of tenants receive State support to help pay their rent) and have been further affected by reductions in welfare benefits. We have a high proportion of older tenants, large families and tenants with vulnerability issues – making warm, affordable and energy efficient homes crucial. When asked for their priority for investment in their homes, most tenants placed energy efficiency top. Furthermore, in July 2019, Bristol City Council declared a climate emergency and this highlighted the urgent need for improvements to me made in housing to reduce carbon and improve energy efficiency.

2.2 Our housing stock (appendix 1) is old (much built 55-85 years ago), many homes are of non-traditional construction (Precast Reinforced Concrete, insitu poured concrete, multi-storey blocks) and over half the stock is flats including 62 high rise blocks and over 400 low rise blocks – all factors meaning making them energy efficient homes is more of a challenge.

2.3 Landlord Services invested around £8m in 2019 / 2020 on energy related improvements/repairs to homes (cladding, cavity wall insulation, improved heating systems etc.) and this level of investment is set to continue for a number of years in response to the climate emergency.

2.4 However, anecdotally we are aware of situations where tenants are not getting the most from energy improvements due to a lack of understanding or awareness of how to use them (e.g. ineffectively controlling new heating systems, opening windows to ‘cool down’ properties which have been clad).

2.5 Therefore Landlord Services is seeking provision of an independent, targeted, impartial, and holistic energy advice service for tenants to include:

* ‘Proactive’ advice to complement Landlord Services’ investment in energy measures to ensure tenants make the best use of improvements, and
* ‘Reactive’ advice to tenants who are having financial difficulties (possibly as a result of welfare benefit reform) to ensure they are getting the best value for money from their energy bills

2.6 The main focus of the service will be direct advice provision to tenants; however, the service will also include provision for:

* Ad hoc advice/support/research to Landlord Services regarding local and national changes in the energy field, grant funding and the potential impact on policies and programmes. The provider will be expected assist Landlord Services in around two enquiries a year
* Training for Landlord Services officers on what the service offers, and making referrals to the service on behalf of tenants who could benefit from it. The provider will be expected to offer referral training at least four times a year.

**3. The Scope**

3.1 Landlord Services is looking to obtain resources of one service provider or consortium, to supply a complete Tenant Energy Advice service (TEA). The TEA service will be available to all Bristol City Council tenants with no eligibility criteria.

3.2 The service should be available to any tenant who requests energy advice, but it should seek to target the following groups (N.B. this list is not exhaustive and may vary over the course of the contract):

* Older people
* People with physical health issues
* People with mental health issues
* People who are known to the council as being vulnerable for any other reason than the above
* People who are known as having previously requested their gas supply to be capped off
* People who have refused the offer of new central heating or other energy works
* People who are known to be in rent arrears and are therefore likely to be in arrears with other household bills

3.3 The advice service should include, but is not limited to, the following energy topics:

* Reducing fuel debt
* Switching supplier to reduce energy bills
* Making best use of heating systems to reduce energy consumption and maintain a warm and healthy home
* Claiming fuel discounts and grants (e.g. Warm Home Discount)
* Minimising damp, mould and condensation through behavioural changes

3.4 The service provider will be expected to have an awareness of the types of issues facing council tenants. This awareness, together with expertise in the energy and advice field, will enable the provider to research and suggest services and activities which contribute towards the desired outcomes (see section 13 – Service Level Outcomes) and which will make a positive impact on our tenants.

3.5 As this is a fluid service in terms of, for example, tenant types and needs, property types, different heating appliances, availability of grants, competition in the energy market, and the weather, it is difficult to predict what the exact service requirements will be. Flexibility of service in response to changing needs is therefore a key requirement.

3.6 Data relating to the profile of BCC properties and BCC tenants is included for information in appendix one and appendix two respectively.

3.7 Training required for Landlord Services officers will be delivered to teams who most frequently come into contact with tenants as part of their day-to-day roles, such as Rents Officers and Repairs Operatives.

3.8 Advice and guidance to Landlord Services will be on an ad-hoc basis and will be requested by the Landlord Services contract manager where required.

**4. The Service**

4.1 The TEA service will be a diverse and flexible service, capable of meeting BCC priorities and the changing needs of our tenants, as well as being able to adapt to new regulatory requirements, changes in law and availability of energy grants/discounts.

4.2 Priorities and objectives will be agreed jointly between dedicated contract managers from Landlord Services and the service provider, immediately prior to the contract start date and will be reviewed regularly via monthly point of contact meetings.

4.3 The Council reserves the rights to review the contractual performance and on an annual basis will determine whether the contract is to be extended or terminated. BCC expect the successful contractor to produce management information and data reports to evident the monitoring of the KPIs.

4.4 The Tenant Energy Advice service should include (but is not limited to) the following mechanisms for delivering advice to tenants:

* A **dedicated free phone telephone advice line** which is available Monday – Friday, for at least 8 hours per day (e.g. 8:30am – 4:30pm)
* A **dedicated email address and web page** with a minimum service standard that emails will be responded to within 5 working days
* **Home visits** for tenants who require advice in person with at least a 30-minute appointment slot. Home visits should be offered where telephone advice has not been sufficient to deal with the issues raised by the tenant/referrer, and/or where the person is vulnerable and will benefit from advice in person. It is expected that the provider will accommodate at least 50 home visits a year
* **Home visit demonstrations** for tenants who require help in using their heating system, draught proofing and support in other energy saving initiatives including supplying energy efficient light bulbs where necessary
* **Alternative and innovative methods of providing advice** for tenants who prefer to use a digital platform to engage with the service, for example video calling or live chat
* **Workshops for specific energy topics** (e.g. claiming Warm Home Discount) and a regular presence at organised events/drop-ins (e.g. food banks) within our communities all workshops/events/drop-ins must be held at accessible venues, using council-owned venues where possible. Workshops will be for a minimum two-hour period and be staffed by at least two people. The venue costs will be met by the TEA service budget. It is expected that the provider will accommodate at least four workshops a year and attend at least ten organised events or drop-ins
* **Presentations at existing tenant events**, such as Service User Group meetings and Local Housing Forums or as part of any other health, financial inclusion or energy-related work affiliated with BCC. It is expected that the provider will accommodate at least four events a year
* **Mail outs to tenants on specific subjects** (e.g. offering advice to tenants who have received new heating systems to make the most of this). This includes production and distribution of the materials needed and translated information provided where requested. It is expected there will be at least one mail out per year to around 300 tenants
* **Help sheets/leaflets/videos** which offer advice (e.g. video showing how to use heating system). This also includes a requirement to produce a general leaflet to explain what the service offers and how to make contact or make a referral. It is expected that at least one new help sheet, leaflet and video will be required a year by the provider
* **Information articles** in BCC’s quarterly Housing News publication or other BCC publications as necessary. This includes production of such articles and liaison with the Communications Officer for Landlord Services regarding content, word count and deadlines, It is expected that two articles per year will be required by the provider

4.5 The service provider must be impartial and must not make any financial benefit from advice provided around switching energy supplier. All advice offered must be in the best interests of the tenant

4.6 The service provider will be expected to minimise waiting times for tenants wishing to engage in the service and will therefore be required to ensure no tenant is waiting longer than 7 days for their case to be opened

**5. Service Conditions and Environmental Factors**

5.1 Where home visits are required, there may occasionally be a need to attend a property in pairs, or to attend with a BCC Officer. Landlord Services will ensure that addresses requiring a home visit will be checked for any known hazard. There will be a procedure in place for the successful service provider to request this information before each visit.

5.2 BCC houses a number of tenants with vulnerabilities around physical health, mental health or addiction issues. The service provider will be expected to treat all tenants professionally, with respect and sensitivity, and without judgement.

5.3 The service should offer support to tenants but should not be disparaging of BCC’s policies/procedures in front of tenants. Any tenant who wishes to request a repair or has a complaint about a BCC service should be referred to the relevant BCC team for a response.

5.4 Feedback to Landlord Services on repairs services or planned maintenance programmes is welcomed and should be passed to the Landlord Services contract manager.

5.5 The service provider will be expected to comply with the following sustainability requirements:

* Use products and practices which reduce environmental impacts
* Ensure that any staff and subcontractors involved in the delivery of this contract receive an appropriate level of training in sustainability and energy efficiency awareness
* Ensure that Service providers’ staff will be paid fairly and will incorporate changes in regulations, such as the living wage
* Ensure that contract delivery will be flexible enough to meet changing social and economic needs

**6. Technology and Systems**

6.1 The service provider will be expected to set up or have an existing database which will record and maintain accurate information regarding contract performance and spend analysis. This database must be capable of storing tenants’ data in accordance with the Data Protection Act 2018 and General Data Protection Regulation (GDPR). The service provider will also be expected to subscribe to a data sharing agreement with BCC.

6.2 All materials, documents, media and reports **must** be provided in a standard format, such as Microsoft Office Word, Excel, PowerPoint, Project etc, which eliminates the need for any special licences or software to be installed.

6.3 BCC is in the process of implementing a new Housing Management System called Civica Cx. An element of this new system is the web based Contractor Portal, through this the successful service provider will;

* Receive referrals for advice
* Record appointments, (if applicable, appointments may not be required for certain advice areas)
* Pass invoices for payment
* Obtain asset information (property type, any planned energy improvement works)
* Provide information about advice provided and indicate the closure of a case

6.4 This Contractor Portal is still in development and will receive regular updates after it has gone live. The above list of activities is not comprehensive and additional functionality may be added at a later date that the Tenderer will be expected to use, (e.g. uploading test certificates)

The minimum software / hardware requirements to run the Contractor Portal are:

**Software**

* Web Browser; IE 8 or above, Chrome (any version), Safari  (v6 or above), Firefox (v5 or above)
* MS Word / Excel 2007 (or 2003 with docx add-in)
* PDF reader (e.g. Acrobat)

**Hardware**

* Any device that can access the internet with a screen size of six inches or more, (i.e. not a phone)
* An internet connection

**7. Complaints and Compliments**

7.1 The provider should have a complaints procedure in place. Service users should be informed of the complaints procedure upon receiving the service from the provider. A process should be in place that ensures that all concerns and complaints are thoroughly investigated and an appropriate response is given to complainants within a specified time frame.

7.2 The provider will take appropriate action when concerns/complaints are upheld and partially upheld. The provider will need to regularly analyse the number and nature of complaints and compliments to establish trends and takes action to implement service improvements as a result of the learning from complaints.

**8. Safeguarding**

8.1 The service provider must ensure that it has established its own safeguarding policy in accordance with legislation and local multi-agency policies. The service provider shall also ensure mechanisms to ensure safeguarding concerns are reported as outlined in the Council policy on reporting safeguarding concerns.

8.2 The Provider shall designate a manager with responsibility for safeguarding in respect of the TEA service, whose responsibilities shall include (but not necessarily be limited to) ensuring safeguarding policies and procedures are in place and understood by all the provider’s personnel.

8.3 The provider will ensure effective measures are in place for safe recruitment including enhanced level checks for staff members through the Disclosure and Barring Service (DBS) who will be working directly with vulnerable tenants. The Provider shall not employ or use the services of any person whose previous conduct or records indicate that they would not be suitable to carry out energy advice service activities or who may otherwise present a risk to service users.

**9. Equalities**

9.1 Bristol City Council expects the provider to work to the principles of the Equality Act 2010, in particular the s.149 public sector equality duty. The provider must have due regard to the need to:

* Eliminate discrimination, harassment, victimisation and any other conduct prohibited under the Act
* Advance equality of opportunity between persons who share a relevant characteristic and persons who do not share it
* Foster good relations between persons who share a relevant protected characteristic and persons who do not share it

9.2 The provider must have adequate equalities policy and procedure which is followed at all times and must ensure that staff are adequately inducted and trained.

9.3 **The service provider must publicise the service and its activities in a range of ways in order to reach a broad spectrum of tenants, with a particular emphasis on targeting hard to reach groups.**

9.4 The provider will be asked to collect anonymised equalities data regarding tenants assisted by the service where tenants are happy to provide this information. BCC will provide a template for collection of the data and will use the data to measure how the service is being accessed by tenants with protected characteristics. The data will be stored by the provider in a secure format (see section 11 – Information Security).

9.5 The provider must ensure that any workshops or other events held in non-council owned venues are fully accessible to disabled tenants.

9.6 The service provider will provide information in alternative formats (e.g. braille, large print) or alternative languages where this is requested.

**10. Social Value**

10.1 Social Value is about integrating economic, environmental and social sustainability into the Council’s commissioning and procurement processes. It is based on the Public Services (Social Value) Act 2012 which came into force on 31st January 2013. The Act requires public bodies to consider Social Value in service contracts (and contracts for goods where there is a service element) above a prescribed financial threshold.

10.2 As part of the tender submission process, the provider will be asked to demonstrate how they would be able to add social value as part of the TEA contract and will be required to submit this through the ‘Social Value Portal’.

10.3 Examples of adding social value through contracts could include employment, skills and training opportunities for young people to enable them to acquire skills needed to enter the workforce, or a focus on ‘green’ issues such as environmental protection and enabling measures to reduce carbon emissions, energy efficiency, waste minimisation and recycling.

**11. Information Security**

11.1 The service provider must have a robust policy around safe storage of data and data sharing, information security, and confidentiality of sensitive information in accordance with the Data Protection Act 1998, General Data Protection Regulation (GDPR) and all staff working for the service provider in the delivery of the TEA service must be trained to meet such policies/legislation. The service provider will also be expected to subscribe to a data sharing agreement with BCC.

11.2 Where BCC is asking for proactive advice to be delivered to a group of specific tenants, addresses will be provided to the service provider using a password-encrypted Excel spreadsheet. This will include tenant name and address, telephone number, and supporting information about the reason for contact being made (e.g. type of heating system in the property).

11.3 Information about known risks relating to council tenants will be highlighted and provided in a secure format and frequency which will be determined at the start of the contract.

11.4 All email correspondence between BCC and the service provider which incorporates any personal information about BCC tenants, will be sent using a ‘secure send’ function.

11.5 The service provider must not share tenant information with any external agency, unless providing an update on outcomes achieved to the original referral source, or providing the contract manager within Landlord Services the required performance management data.

11.6 Tenant information may be shared within the successful service provider’s organisation only if this is to enable the tenant to benefit from advice or assistance from another free initiative or advice service.

**12. Required Interface with other Agencies or Services**

12.1 The service provider will be required to work closely with council services and external agencies, to accept referrals, share information, and provide updates on advice given and outcomes achieved. These interfaces will be individual to the external agencies and council services and will be set up and agreed at the start of the contract and reviewed periodically throughout the contract.

12.2 Examples of referral sources include:

* Direct referrals from tenants
* Referrals on behalf of tenants from BCC services
  + Estate Management service (Housing Officers)
  + Responsive Repairs service
  + Rent Management service
  + Planned Programmes (who will be managing the contract)
  + Sensory Support service
  + Any other as yet unnamed BCC services
* Referrals on behalf of tenants from external services
  + GP surgeries
  + Energy suppliers (regarding tenants who are on the Priority Services Register with their supplier and need additional energy-related assistance)
  + Any other external agencies who are working with BCC tenants, are aware of the service and want to refer someone for advice

**13. Service level outcomes**

13.1 Measurement of the service will be based on outcomes rather than specific quantifiable products or services. Tenderers will be asked to present a proposal which outlines how they propose to structure the service for year one, while considering the above topics, mechanisms and target groups, to best meet the following outcomes:

* Minimise the number of tenants in fuel debt
* Minimise the frequency and severity of damp, mould and condensation in homes where this is controllable via behavioural change
* Minimise tenant fuel consumption whilst still maintaining a warm and comfortable home
* Minimise the number of tenants who have capped-off gas supplies
* Maximise the take up of new heating systems offered to tenants
* Maximise the number of tenants claiming energy-related discounts and grants they are entitled to receive
* Maximise the number of tenants who switch energy supplier to reduce energy bills
* Maximise the number of tenants on the Priority Services Register with their energy supplier
* Build a service that where possible, encourages and promotes self-sufficiency and resilience and that minimises continuing dependency on the service
* Create social value through the delivery of the service
* Contribute to the improvement of the responsive and planned improvement programmes we deliver via ad-hoc advice and guidance about local and national energy sector changes

13.2 The service provider will be required to provide monthly, quarterly and annual reports to the Landlord Services Project Manager in a format agreed by BCC. These reports will be used to track budget spend, monitor trends in service take-up, identify gaps in service provision and review priorities.

13.3 The service provider will be expected to look for opportunities for service improvement throughout the duration of the contract and make suggestions around new energy advice topics, methods of delivery, or ways to better reach our most vulnerable tenants in need of support.

13.4 The service provider will be required to give regular budget updates including itemised spend.

13.5 The service provider will be expected to provide and keep current company policies around health and safety, data protection, GDPR, information security and safeguarding.

13.6 The service providers must ensure that staff members are suitably trained to deliver energy advice and are aware of all policies and procedures relating to the service. All staff members will be qualified to a minimum of City and Guilds Level 3 in Energy awareness or hold a similar level qualification in an Energy advice related field. All staff members will also hold at minimum, a basic understanding of welfare rights, benefits and universal credit and be able to assist; support and sign post tenants accordingly.

**14. Performance Monitoring/Targets**

14.1 The service provider will be expected to report monthly and quarterly to the project manager on performance outcomes and budget spend. The reporting requirements are difficult to specify due to the flexible nature of the advice service and may be varied over the course of the contract. The reporting requirements may also vary following implementation of Landlord Services new Housing Management System.

14.2 As a guide, the reporting requirements should include (but not be limited to):

14.2.1 Monthly

* How many referrals were received and from where, e.g. tenant self-referral, BCC Repairs service, GP etc
* With the tenants consent, the names and addresses of individuals who have been assisted by the TEA service and on which topic
* Budget spend

Upcoming advice activities (to be provided by email to selected BCC officers)

14.2.2 Quarterly

* Collective outcomes achieved for tenants which reflect the outcomes set out in 13.1 (see above), e.g. total amount of Warm Home Discount tenants have been assisted to claim, number of tenants taking up offer of new heating following TEA involvement, number of tenants no longer with capped-off gas etc
* Average wait for contact by the advice service following referral
* Overall budget update, plus actual unit costs for delivery of each generic mechanism or activity e.g. home visit, workshop etc
* A log of addresses where any energy efficiency light bulbs have been provided and in which room they were installed
* Customer satisfaction data, e.g. number of complaints, number of tenants who were happy with the outcome of their interaction with the service (measurement of tenant satisfaction to be agreed prior to the start of the contract)
* An evaluation of cost effectiveness, pros and cons of different delivery mechanisms, and recommendations for future delivery
* An update on social value added through the delivery of the contract
* An update on advice/support provided to BCC around improvement programmes we are delivering

14.2.3 Annually

* A summary report of the activities for the contract year (collating the information collected and provided in the quarterly reporting requirements detailed above)

**15. Armed Forces Community Covenant for Bristol**

15.1 On June 23rd 2014, Bristol City Council signed the Bristol Armed Forces Community Covenant. This is a voluntary statement of mutual support between the civilian community and the local Armed Forces community in Bristol.

15.2 This Bristol initiative reflects the government’s tri-service Armed Forces Covenant. This reflects government policy to improve the support available for the Armed Forces community.

15.3 The Bristol Covenant builds relationships and local support, between the council and other organisations, the bases and the charities that support in-service and ex-service personnel and their families.

15.4 It is not intended to give preferential treatment to the Armed Forces community, but to ensure that they do not suffer detriment because of their service to our country. Members of this community can experience a range of challenges. The council is keen to ensure parity of outcome for the armed forces community with our other residents. There are many independent charities that provide specific support for the armed forces community and the council is keen that these are signposted to qualifying residents. Details of services and more details about the covenant can be found here: <http://www.bristol.gov.uk/page/community-and-safety/armed-forces-community-covenant>

**Appendix one – Profile of BCC’s 27,015 properties**

|  |  |
| --- | --- |
| **Dwelling Type** | **Number** |
| Bungalow | 1,082 |
| Flat | 12,824 |
| House | 11,362 |
| Maisonette | 1,747 |

|  |  |  |
| --- | --- | --- |
| **Dwelling** | **Block Type** | **Number** |
| Flat | House-type | 4,468 |
| Flat | Walk up | 4,747 |
| Flat | Multi-storey | 3,609 |
| Maisonette | House-type | 49 |
| Maisonette | Walk up | 1,124 |
| Maisonette | Multi-storey | 574 |

|  |  |
| --- | --- |
| **Build** | **Number** |
| Traditional | 19,188 |
| Non-traditional | 7,827 |

|  |  |
| --- | --- |
| **Age Band** | **Number** |
| Pre-1945 | 6,898 |
| 1945-1964 | 11,644 |
| 1965-1974 | 4,279 |
| 1975-1999 | 3,498 |
| Post-1999 | 696 |

|  |  |
| --- | --- |
| **Wall Insulation** | **Number** |
| Cavity wall insulation | 14,476 |
| External wall insulation | 8,513 |
| Internal wall insulation | 54 |
| No wall insulation | 3,907 |
| Unknown | 65 |

|  |  |
| --- | --- |
| **Heating Type** | **Number** |
| Gas C/H | 21,031 |
| Communal | 2,863 |
| Electric Heatpump | 463 |
| Electric NSH | 2,485 |
| Electric - other | 69 |
| Solid Fuel | 14 |
| Gas Fire only | 51 |
| Unknown | 39 |

|  |  |  |
| --- | --- | --- |
| **Dwelling** | **Loft insulation** | **Number** |
| House / Bungalow | None | 82 |
| House / Bungalow | Less 200mm | 1,376 |
| House / Bungalow | 200mm or more | 10,936 |
| House / Bungalow | Unknown or unexposed | 50 |
| Flat / Maisonette | None | 108 |
| Flat / Maisonette | Less 200mm | 1,070 |
| Flat / Maisonette | 200mm or more | 3,410 |
| Flat / Maisonette | Unknown or unexposed | 9,983 |

**Appendix two – Profile of BCC’s 30,915 tenants**

|  |  |
| --- | --- |
| **Gender** | **%** |
| Man | 37.50% |
| Woman | 62.50% |
|  |  |
| **Total** | **100.00%** |

|  |  |
| --- | --- |
| **Age Band** | **%** |
| 16-24 | 2.08% |
| 25-34 | 31.69% |
| 45-64 | 40.37% |
| 65-74 | 13.32% |
| 75+ | 11.09% |
| Not known | 1.45% |
|  |  |
| **Total** | **100.00%** |

|  |  |
| --- | --- |
| **Disability** | **%** |
| Hearing Impairment | 2.21% |
| Learning Impairment | 2.39% |
| Long Term Illness | 12.32% |
| Mental Distress | 10.87% |
| Mobility Impairment | 11.74% |
| Other | 4.97% |
| Visual Impairment | 1.61% |
| Wheelchair User | 1.61% |
| Speech Impairment | 1.04% |
|  |  |
| **Total** | **48.76%** |

|  |  |
| --- | --- |
| **Sexual Orientation** | **%** |
| Heterosexual | 69.98% |
| LGBT | 1.55% |
| Other | 0.88% |
| Prefer not to say | 7.95% |
| Not recorded | 19.64% |
|  |  |
| **Total** | **100.00%** |

|  |  |
| --- | --- |
| **Ethnicity** | **%** |
| White British/English/Scottish/Welsh) | 70.45% |
| White Other (EU, Irish) | 4.09% |
| BME | 19.59% |
| Not known/question refused | 5.87% |
| **Total** | **100.00%** |

|  |  |
| --- | --- |
| **Religion** | **%** |
| Buddhist | 0.33% |
| Christian | 34.02% |
| Hindu | 0.26% |
| Jewish | 0.05% |
| Muslim | 8.10% |
| None | 29.74% |
| Not known or stated | 3.83% |
| Other | 2.22% |
| Prefer not to say | 1.76% |
| Sikh | 0.12% |
| **Total** | **100.00%** |