

## **DYNAMIC PURCHASING SYSTEM (DPS) FOR DESIGN AND CONSULTANCY SERVICE SPECIALISING IN GREEN RETROFIT AND DECARBONISATION STRATEGIES AND EXPERTISE**

### **SPECIFICATION**

#### **Consultancy General**

Consultants must ensure that their work force have the necessary qualifications and hold any relevant certification that demonstrates their ability to undertake tasks in their profession. Equivalent qualifications are acceptable, but the Consultants must be able to provide justification and evidence that the alternative proposed qualification and experience meets the requirement detailed.

Note that contracting bodies may choose to validate during a Call for Competition (Further Competition) the minimum qualifications of directly employed employees (and where appropriate Sub-Consultants) identified to work on specific call off contracts.

Consultants are encouraged to hold certification, trade body membership and/or third-party accreditations that demonstrates the capability of the work they are undertaking.

#### **DPS Objectives**

- To provide a range of consultancy services to meet the needs of the Client as and when required.
- To provide value for money services, adding extra value when possible.
- To maintain a best value position through an integrated approach to cost management aimed at eliminating priced risk.
- To develop a partnership with collaborative, open, innovative and considerate approaches, continuously improving the DPS Agreement to bring value and service improvement via the best use of resources, knowledge and skills.
- To operate and maintain appropriate systems, processes and records to ensure that the Consultant will, at all times, deliver timely and accurate management information to the Client in accordance with the provisions of the DPS Agreement or Underlying Contract;
- To ensure a high level of Client satisfaction.
- To deliver innovation, expertise and continuous tangible improvements in efficiency, quality, productivity and environmental impact.

- **Lot 1 - Retrofit Strategy Advisor**

Item 1.1	General
<b>Role Specification</b>	The Consultant will undertake overall stock assessment, data analysis, archotyping, measures identification and develop strategy for individual or multiple properties as required, to identify a preferred set of refurbishment interventions which respond to the following objectives:

	<ul style="list-style-type: none"> <li>a. Understanding of the Customer's expectations, objectives and budget;</li> <li>b. Improvements in EPC/SAP rating;</li> <li>c. Carbon emissions reduction;</li> <li>d. Resident fuel bill savings;</li> <li>e. Capital investment 'payback';</li> <li>f. End user experience and ease of use.</li> </ul>
<b>The Client may require demonstration of the following or equivalent</b>	<p><b>Memberships</b></p> <ul style="list-style-type: none"> <li>• Member of TrustMark approved Retrofit Coordinator Scheme</li> </ul> <p><b>Professional Accreditations</b></p> <ul style="list-style-type: none"> <li>• Level 5 Diploma in Retrofit Coordination and Risk Management</li> <li>• Green Deal Advisor</li> <li>• C&amp;G Energy Awareness and Advice</li> </ul>

• **Lot 2 - Retrofit Assessor/Retrofit Evaluator**

<b>Item 1.1</b>	<b>General</b>
<b>Role Specification</b>	<p>The Consultant will undertake an assessment of completed Energy Performance Certificates (EPC), Display Energy Certificates (DEC) and / or property asset management data and produce a written report, for individual or multiple properties as required, to identify a preferred set of refurbishment interventions which respond to the following objectives:</p> <ul style="list-style-type: none"> <li>a. Understanding of the Customer's expectations, objectives and budget;</li> <li>b. Improvements in EPC/SAP rating;</li> <li>c. Carbon emissions reduction;</li> <li>d. Resident fuel bill savings;</li> <li>e. Capital investment 'payback';</li> <li>f. End user experience and ease of use.</li> </ul>
<b>Item 1.2</b>	<b>Performance Specification</b>
	<p><b>Energy efficiency technology or intervention assessment</b></p> <p>(i) The Consultant will undertake an assessment of completed Energy Performance Certificates (EPC), Display Energy Certificates (DEC) and / or property asset management data and produce a written report, for individual or multiple properties as required, to identify a preferred set of refurbishment interventions which respond to the following objectives:</p> <ul style="list-style-type: none"> <li>a. Understanding of the Customer's expectations, objectives and budget;</li> <li>b. Improvements in EPC/SAP rating;</li> <li>c. Carbon emissions reduction;</li> <li>d. Resident fuel bill savings;</li> <li>e. Capital investment 'payback';</li> <li>f. End user experience and ease of use.</li> </ul> <p><b>Energy efficiency technology or intervention options appraisal</b></p>

- (i) The Consultant will undertake options appraisals and feasibility studies as agreed with the Customer and produce a written report to identify the most suitable measures to improve energy efficiency of an individual property and/or properties as required.
- (ii) In this instance, energy efficiency may include building fabric interventions, renewable energy technologies and communal heating. Recommendations produced as part of the report are to be restricted to product types, not specific brands or models.
- (iii) In addition to desk based modelling, the Consultant will be required to inspect a Customer's property and/or properties to collect all required information to conduct an energy assessment (including production of an EPC / DEC or Full SAP report as required), including details of the property/properties dimensions, construction, thermal performance, airtightness, heating/hot water provision and other renewable energy technologies. The options appraisal and report may be required to acknowledge and allow for:
- a. Understanding of the Customer's expectations, objectives and budget;
  - b. Existing condition of thermal elements (including heat loss and air tightness);
  - c. Existing condition of heating and energy provision;
  - d. Internal and external air quality;
  - e. Existing construction type and associated building physics i.e. breathable structures and moisture movement within external walls;
  - f. Defects or potential for defects, inherent within the building;
  - g. Exposure, location and orientation;
  - h. Areas of technical concern requiring bespoke construction details;
  - i. Any existing asset management maintenance programme;
  - j. Carbon emissions reduction;
  - k. Resident fuel bill savings;
  - l. Capital investment 'payback';
  - m. Operational and maintenance considerations;
  - n. Improvements in EPC/SAP rating;
  - o. End user experience and ease of use;
  - p. Planning considerations.

**Construction detail enhancement**

- (i) The Consultant will be required to review construction details, drawings and plans used to undertake Dwelling Emissions Rate (DER), Target Emissions Rate (TER) and Psi Value calculations so as to provide amended designs to either ensure Building Regulations requirements are met or enhance performance.

(ii) Amended details are to be tested using a Building Regulations compliant software package, to demonstrate compliance with Part L1 and L2 of the Building Regulations.

#### **Heat loss calculations**

(i) The Consultant will undertake Building Regulations heat loss calculations for a dwelling(s) in line with BSEN 12831 and / or MIS3005 as required.

(ii) In relation to new build schemes, this will involve desk based modelling, based on technical drawings and construction details for new build properties.

(iii) In relation to existing buildings, the Consultant may also be required to inspect a Customer's property and/or properties to collect all required information, including details of the property/properties dimensions, construction and air tightness.

#### **Airtightness testing**

(i) The Consultant will undertake Building Regulations compliant air tightness testing for a dwelling(s) in line with BS EN ISO 9972:2015 and the appropriate Air Tightness Testing & Measurement Association Technical Standard (L1 or L2).

(ii) The Consultant is to allow for all on site works and equipment necessary to undertake the air tightness test to take place.

#### **Validation and data gathering.**

(i) The Consultant will undertake a performance monitoring exercise for the property and/or properties as required, over a 12-month period, using existing heat/energy meters and relevant sensors and produce a Performance Assessment Report for renewable energy installations to provide information on the actual performance of the installation against projected performance in relation (but not limited to):

- a. Internal temperatures
- b. External temperatures
- c. Energy production
- d. Energy consumption (gas and / or electricity)
- e. Seasonal coefficient of performance (where applicable)
- f. Relative indoor humidity
- g. CO<sub>2</sub>
- h. Financial assessment
- i. Hot water supply
- j. Customer satisfaction

(iii) The Consultant will design and install a performance monitoring exercise for the property and/or properties as required,

over a 12-month period, using new heat/energy meters and relevant sensors and produce a performance assessment report for renewable energy installations to provide information on the actual performance of the installation against projected performance in relation (but not limited to):

- a. Internal temperatures
- b. External temperatures
- c. Energy production
- d. Energy consumption (gas and / or electricity)
- e. Seasonal coefficient of performance (where applicable)
- f. Financial assessment
- g. Hot water supply
- h. Customer satisfaction

(ii) The Consultant will undertake a performance monitoring exercise for individual or multiple properties, as required, over a 12-month period using existing heat/energy meters and relevant sensors to produce a Performance Assessment Report for energy efficiency and insulation installations (new build and refurbishment) and to provide information on actual performance against projected performance in relation, but not limited to:

- a. Internal temperatures
- b. External temperatures
- c. Air tightness/ air changes
- d. Moisture transfer
- e. Air quality
- f. Energy consumption
- g. Over heating / thermal inertia
- h. Customer satisfaction

**Additional Complimentary Services**

These additional services may be required by a client in addition to the provision of the energy assessment services above. The ability to deliver these services would not preclude a Consultant from bidding for a place on this Lot.

**EPC, DER and SAP reports**

(i) The Consultant will be required to inspect a Customer's property and/or properties to conduct an energy assessment and collect all required information, including details of the property / properties dimensions, construction, heating / hot water provision and other renewable energy technologies. The Consultant will feed the relevant information into an authorised software programme to produce the Energy Performance Certificate (EPC) or Display Energy Certificate (DEC) or full Standard Assessment Procedure (SAP) report and recommendation report;

(ii) The Consultant will lodge the certificate onto the relevant national register via their accreditation and certification scheme

	<p>and provide the Customer with a copy. The Consultant will supply two full colour hard copy certificates for each surveyed property and one electronic version of the certificate on hard disc or as requested and agreed with the Customer;</p> <p>(iv) The Consultant will arrange appointments with residents / occupants of the surveyed property and / or properties as required and must allow for the provision of all necessary access equipment to achieve this;</p> <p>(vi) The Consultant will supply a full and final certificate / report, complying with current government requirements, for each of the surveyed properties within 10 working days of completing each discrete element of site works.</p> <p><b>Building Regulations Compliance - DER / TER calculations</b></p> <p>(i) The Consultant will be required to undertake an assessment of new build construction details and other thermal performance and design information to undertake DER and TER calculations, using a Building Regulations compliant software package, to demonstrate compliance with Part L of the Building Regulations.</p> <p>(ii) The Consultant may also be required to calculate Psi Values (thermal bridging) of new build designs</p>
<p><b>The Client may require demonstration of the following or equivalent</b></p>	<p><b>Memberships</b></p> <ul style="list-style-type: none"> <li>• Member of TrustMark approved Retrofit Coordinator Scheme</li> </ul> <p><b>Professional Accreditations</b></p> <ul style="list-style-type: none"> <li>• Level 5 Diploma in Retrofit Coordination and Risk Management</li> <li>• DEA (Path B&amp;C)</li> <li>• Specialist Level 3 – 6 awards in traditional buildings</li> <li>• Certified DEA by UKAS accredited assessor body</li> </ul>

• **Lot 3 - Retrofit Coordinator**

Item 1.1	General
<p><b>Role Specification</b></p>	<p>The main responsibility of the Retrofit Coordinator (hereafter referred to as the Consultant) is to specialist project leadership and management to ensure that work is carried out to the Customer's standards, specification and schedule whilst managing technical risks, avoid the common retrofit failure points, increasing team productivity, maximising project budgets and minimising unnecessary expenditure. The specifications will be prepared by architects or engineers employed by the Customer. The Consultant will ensure that the correct materials and workmanship are used and that the Customer is given quality work and value for money.</p>

Item 1.2	Performance Specification
	<p>The Consultant may be required to support existing Customer Teams and Officers and / or deliver the complete Retrofit Coordination service to Customers. As such, the Consultant must be able and prepared to offer the following services:</p> <p><b>1 Assessment related</b></p> <ul style="list-style-type: none"> <li>(i) Assess appropriate level of analysis: RdSAP SAP, PHPP, Therm, Air test, moisture movement. Clarity and usability of results</li> <li>(ii) Assess range of disruption that may be acceptable</li> <li>(iii) Identify critical time constraints</li> <li>(iv) Hazardous materials consequences, latent building defects - extra costs/ time, initial budgeting</li> <li>(v) Assess funding streams</li> <li>(vi) Ensure team have access to all existing data and adequate access to site is provided</li> </ul> <p><b>2 Design related</b></p> <ul style="list-style-type: none"> <li>(i) Whole house plans: reliability, usability, buildability</li> <li>(ii) Analysis of benefit/ disruption. Investigate scenarios to find optimum solution</li> <li>(iii) Implications on programme length and sequence</li> <li>(iv) Assess interaction between measures and fabric. Buildability, robustness, maintenance and H&amp;S implications</li> <li>(v) Develop cost plan for whole project. Establish appropriate level of ambition. Cost/ benefit analysis and whole life cost</li> <li>(vi) Lead team proactively. Identify critical issues and set the tone for collaborative working. Asking awkward questions. Avoid ambiguity</li> </ul> <p><b>3 Planning related</b></p> <ul style="list-style-type: none"> <li>(i) Benchmark charts for easy reading. Case studies/ precedents</li> <li>(ii) Analysis of benefit/ disruption. Investigate scenarios to find optimum solution</li> <li>(iii) Contingency plans if unsuccessful</li> <li>(iv) Risk/ benefit analysis of measures in Planning context.</li> <li>(v) Develop cost plan for whole project. Establish appropriate level of ambition. Cost/ benefit/ analysis and whole life costs</li> <li>(vi) Facilitate pre-app discussion if required</li> </ul> <p><b>4 Specification</b></p> <ul style="list-style-type: none"> <li>(i) Help with preparation of clear information in a format that is useful. Standards and method of assessment</li> <li>(ii) Logistics plan including effect on occupiers - disruption/decant requirements</li> <li>(iii) Lead times, critical path, clear sequencing or work contingency</li> <li>(iv) Supply chain checks both immediate and long term. Certification and length of warranties</li> </ul>

	<ul style="list-style-type: none"> <li>(v) Performance and / or product type based specification. Interface responsibilities described adequately. Sequencing made explicit. Testing regime</li> <li>(vi) Ensure specification from different team members is integrated and clear. Ensure the information is presented in a format that is usable on site</li> </ul> <p><b>5 Tendering</b></p> <ul style="list-style-type: none"> <li>(i) Respond to queries. Assess contractor returns and priced schedule of works. Assess level of contractor's awareness of issues</li> <li>(ii) Management of decant or other disruptions. Arrange handover procedures. Ensure occupier information is ready and useful</li> <li>(iii) Identify programme issues pertinent to contractor and works</li> <li>(iv) Is the information open to abuse. Avoid claims for extras, 'down specifying' and avoidance of responsibility</li> <li>(v) Ensure tender is realistic. Identify extra costs for review. Maintenance work</li> <li>(vi) Value contractor feedback. Adjust implementation plans as required. Check knock on consequences</li> </ul> <p><b>6 Contract</b></p> <ul style="list-style-type: none"> <li>(i) Check on site to ensure works being carried out as specified. Specialist test providers used at appropriate stages</li> <li>(ii) Management of decant or other disruption. Arrange handover procedures. Ensure occupier information is ready and useful</li> <li>(iii) Collaborate with contractor to maintain schedule and key performance targets</li> <li>(iv) Unforeseen circumstances - contingency plans/ flexibility built into design. Contingency money or identified sacrificial items of work</li> <li>(v) Control variations with priced schedule of work. Re-negotiate rates/ spec of non-critical items if necessary.</li> <li>(vi) Value contractor feedback. Adjust implementation plans as required. Check for knock on consequences. Do's &amp; don'ts on site. Tool box talks. Everyone past the site entrance to have induction on critical issues</li> <li>(vii) Approve or recommend acceptance of handovers</li> </ul> <p><b>7 Post occupancy evaluation</b></p> <ul style="list-style-type: none"> <li>(i) Analysis, summary and conclusion for this and future works. Remedial measures</li> <li>(ii) Data acquisition methods appropriate to project and privacy</li> <li>(iii) Monitor for at least 1 seasonal cycle</li> <li>(iv) Equipment failure</li> <li>(v) Specify requirements and negotiate cost early on. Coordinate installation of equipment with contractor. Test equipment adequately before sign-off.</li> <li>(vi) Involve client and whole team in review of POE</li> </ul>
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	<p><b>8 Reporting</b></p> <p>Consultants will keep detailed records of the work, which they will put together in weekly reports for the architect and/or planner and/or Customer. Records will include details of, but not limited to:</p> <ul style="list-style-type: none"> <li>(i) progress and any delays or deviations</li> <li>(ii) the number and type of workers employed</li> <li>(iii) weather conditions</li> <li>(iv) visitors to the site</li> <li>(v) drawings received</li> <li>(vi) deliveries</li> <li>(vii) photographs of contentious/completed works as directed by the Customer</li> <li>(viii) a schedule of outstanding works to ensure all ‘snagging’ items are sufficiently rectified</li> <li>(ix) details of any significant events or concerns including any serious deficiencies in health or safety performance observed while on site</li> </ul>
<p><b>The Client may require demonstration of the following or equivalent</b></p>	<p><b>Memberships</b></p> <ul style="list-style-type: none"> <li>• Member of TrustMark approved Retrofit Coordinator Scheme</li> </ul> <p><b>Professional Accreditations</b></p> <ul style="list-style-type: none"> <li>• Level 5 Diploma in Retrofit Coordination and Risk Management</li> </ul>

- **Lot 4 - Retrofit Designer**

<b>Item 1.1</b>	<b>General</b>
<b>Role Specification</b>	<p>The role will involve site visits to carry out surveys, working closely with Clients to understand project needs. Provide designs and documentation for the Retrofit Installer(s). In addition, the Retrofit Designer will provide an understanding of buildings energy efficiency to the wider Product Development team and input to research projects, testing new technological approaches.</p>
<b>Item 1.2</b>	<b>Performance Specification</b>
	<ul style="list-style-type: none"> <li>• Determine initial requirements</li> <li>• Advise the Client in advance of the process</li> <li>• Evaluate retrofit improvement options</li> <li>• Advise on how to select Measures</li> <li>• Advise on how Retrofit Design required</li> <li>• Advise on Procurement options and the operation and maintenance of installed measures after Retrofit.</li> <li>• Provide Retrofit design documentation consisting but not limited to the following information:</li> </ul>

	<ul style="list-style-type: none"> <li>• Identification of the address and precise location of the dwelling(s) in which the EEM(s) are to be installed</li> <li>• Identification of any access constraints and access instructions provided by the Client or the occupants</li> <li>• A copy of the assessment report of the condition of the dwellings including identification of any repairs necessary before installation of EEMs</li> <li>• Any assumptions on which the design is based, including assumptions that underpin the assessment of the dwelling(s)</li> <li>• Confirmation of the compliance of the design with the relevant standards</li> <li>• Specifications of the materials, products and systems to be used, and of where and how they are to be installed, whether within the dwelling or on its exterior</li> <li>• Construction details for all affected corners, junctions and edges of installed measures (whether prepared by the Retrofit Designer or obtained from a proprietary system designer, or clear identification of any standards details that are to be used, and where</li> <li>• Installation instructions for all new systems and equipment</li> <li>• Testing requirements, e.g. testing of new gas systems and electrical installations, thermography to confirm the integrity of the insulated envelope, fan pressurization testing to demonstrate compliance with any airtightness standard, etc.</li> <li>• Testing and Commissioning requirements</li> <li>• Handover requirements</li> <li>• Maintenance instructions</li> <li>• Guarantee and warranty requirements</li> <li>• Provisions of adequate ventilation</li> <li>• Scope, adequacy and suitability of the design</li> </ul>
<p><b>The Client may require demonstration of the following or equivalent</b></p>	<p><b>Memberships</b> Professional Membership of CIOB, CIAT, CARE, AABC, RIBA RICS or RIAS</p> <p><b>Professional Accreditations</b></p> <ul style="list-style-type: none"> <li>• Qualification in sustainable and low-energy building</li> <li>• Post-16 qualification in a related field</li> <li>• A qualification related to the provision of domestic energy advice</li> <li>• Path A: Level 5 Diploma / MCIAT</li> <li>• Path B: As above plus registered Architects, Construction Managers and Building Surveyors</li> <li>• Path C: as above plus CIBSE members who also hold Level 5 Diploma or specialist traditional building qualifications</li> </ul>

- **Lot 5 - Thermographic Surveys**

<b>Item 1.1</b>	<b>General</b>
<b>General</b>	The scope of this lot will include thermographic surveying of properties to help manage heat loss and identify thermal bridging.