# Invitation to Tender Home Upgrade Grant 2 – Glos/South Glos Contractor

Please find below the relevant information in order that you may submit a Tender for the above contract.

## Contents

1. [Scope of the project](#_Scope_of_the)
2. [Timetable of key dates](#_Timetable_of_key)
3. [Bidder’s responsibility](#_Bidder’s_Responsibility)
4. [Tender measures](#_Tender_measures)
5. [Data Privacy Statement](#_Data_Privacy_Statement)
6. [Contractor Information](#_Contractor_information)
7. [Additional information required](#_Additional_information_required)
8. [Next steps](#_Next_steps)

Bidders are advised that a Tender shall only be considered for evaluation when:

* All requirements of the documentation are completed and returned.
* It has met all of the eligibility and mandatory requirements.
* It is submitted back to Severn Wye no later than 17/04/2022. This date is for those who have capacity to start works immediately. This will be an ongoing tender process to ensure demand is met.
* It is accompanied by an undertaking which shall become a condition of the contract that the amount of the Tender has not been calculated by agreement or arrangement with any other person other than the Authority and that the amount of the Tender has not been communicated to any other person until after the closing date for the submission of Tenders.

You are required to hold all information pertaining to this tender process and any resulting work confidential and to limit the dissemination of information within your organisation on a need-to-know basis.

## Scope of the Project

Severn Wye Energy Agency (Severn Wye), as Accountable Body for the Authority (Stroud District Council) and DESNZ, is conducting this tender exercise to establish contracts with Installers to deliver the Home Upgrade Grant 2 programme.

Severn Wye will administer a regional allocation of £6,210,000 to be delivered by the 31st of March 2025 through the project.

We are proposing a dual strategy to target households, by combining data-led and person-led approaches for the identification of needs. Low-income households that are likely to benefit from energy retrofit will be identified through our existing fuel poverty programme (Warm & Well), delivered by Severn Wye. This data-led approach will enable us to identify needs, at the local (district/postcode) and individual level.

The benefits of the project are three-fold: alleviating fuel poverty (making it cheaper to stay warmer during the coldest months), improving health outcomes by creating a more comfortable living environment (thus reducing the number of visits to GPs and hospitals), and reducing carbon emissions (through reduced energy consumption).

We will be supporting the following:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Property type** | | Off gas only | | |
| **Tenure** | | Owner Occupied  Private Rented Sector (conditions apply) | | |
| **EPC Uplift**  ***Ideal – not mandatory*** | | F and G uplift to D  E and D uplift to C | | |
| **Additional Requirements** | | A 90 kWh/m²/year space heating demand (SHD) consideration where reasonable and cost effective for HUG 2 to guide retrofit designs and support a fabric first approach | | |
| **Name of Local Authority** | **Rural-Urban Classification** | | **Prospective Funding Share (%)** | **Estimated Households** |
| **Cheltenham** | Urban with City and Town | | 5.00% | 15 |
| **Cotswold** | Mainly Rural | | 26.00% | 78 |
| **Forest of Dean** | Mainly Rural | | 24.00% | 72 |
| **Gloucester** | Urban with City and Town | | 5.00% | 15 |
| **South Gloucestershire** | Urban with City and Town | | 11.00% | 33 |
| **Tewkesbury** | Largely Rural | | 14.00% | 42 |
| **Stroud** | Urban with Significant Rural | | 15.00% | 45 |

We are looking for Eligible Contractors to complete the below measures to help alleviate fuel poverty. This means working with contractors that are currently trading and meet the scheme requirements (Trustmark Registered Business or a scheme that the Secretary of State is satisfied is equivalent) that will deliver Eligible Measures on behalf of the Local Authority as set out in their Proposal. The contractor must be certified to PAS2035:2019 and PAS 2030:2019 and where low-carbon heating measures are being delivered, the contractor must be a member of the Microgeneration Certification Scheme (MCS). We expect all contractors to work safely as we recover from the pandemic, following Covid-19 secure working practices.

## Timetable of key dates

Set out below is the proposed procurement timetable. This is intended as a guide and whilst Severn Wye does not intend to depart from the timetable it reserves the right to do so at any stage at its absolute discretion.

|  |  |
| --- | --- |
| **Timescale** | **Action** |
| 03/04/2023 | Tender Documents issued to installers |
| 10/04/2023 | Closing date for clarification questions to be submitted to [FundingGlos@severnwye.org.uk](mailto:FundingGlos@severnwye.org.uk) and answers will be returned via the Link to Energy website |
| 17/04/2023 | Closing date for applications for first wave of bidders |
| From 18/04/2023 | Award decision made for first wave of installers, and letter issued |
| From 18/04/2023 | Second wave of applications for further installers on an ongoing basis |
| From 01/04/2023 | Commencement Date of Contract and ongoing installer uptake |

## Bidder’s Responsibility

* 1. It is the responsibility of the Bidder to satisfy themselves as to the nature, extent and circumstances of the services to be provided and satisfy themselves as to their ability to fulfil the requirements detailed in the document.
  2. Bidders will be taken to have, by their own examination of the Contract documents, satisfied themselves as to the full requirements of the project.
  3. Bidders should be aware that Severn Wye envisage that the successful Bidders should mobilise to provide the services required under the Contract shortly after the date of contract award.
  4. Consequences of misrepresentation. If you seriously misrepresent any factual information in filling in the Installer Information Questionnaire, and so induce an authority to enter into a contract, there may be significant consequences. You may be excluded from the procurement procedure, and from bidding for other contracts for a determined time. If a contract has been entered into you may be sued for damages and the contract may be rescinded. If fraud, or fraudulent intent, can be proved, you or your responsible officers may be prosecuted and convicted of the offence of fraud by false representation.
  5. Where the Supplier proposes to use one or more sub-contractors to deliver some or all of the contract requirements, a separate Appendix should be used to provide details of the proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. The installer will be responsible for quality standards of their sub-contractors.
  6. Severn Wye will be implementing a scoring system for applications based on cost from the pricing spreadsheet, capacity, capability, liability and a credit check. The company will then receive an outcome letter and schedule of works. If your application is approved the Contract, SLA and DESNZ privacy notice all need to be signed and returned before works can commence.
  7. Installer responsibilities (red) will be as follows relating to the customer journey.
  8. Severn Wye will deliver the Retrofit Assessment and Retrofit Coordination to all 300 clients under HUG2. Installers will be required to have the capacity to provide Retrofit Design on all 300 households where possible. It is expected that the medium-term retrofit plan will include all recommended/potential measures that are suitable for that dwelling, regardless of which measures are being funded under this scheme – with the aim being for the householder to be in receipt of a medium-term plan for future retrofit options.
  9. Severn Wye have high expectations of their approved Installers including:
     1. Ensure all contractors undertaking the work are appropriately skilled and qualified to complete the agreed works.
     2. Ensure compliance with prevailing legislation, requirements and best practice in respect of Health and Safety and Trading Standards, including safeguarding of vulnerable clients and GDPR.
     3. Have a process in place for handling complaints from clients about the service they receive.
     4. Have the appropriate insurance, accreditations and certifications in place, and will provide these to Severn Wye upon request. The requirements include, but are not restricted to:
        1. Public Liability Insurance
        2. Professional Indemnity Insurance
        3. ICO Registration
        4. Copies of guarantees and fire safe information for any systems used / installed
        5. Certificate of approval or accreditation, where appropriate.
     5. These will be explained fully in the Contract and Installers should read through this document upon approval of application.

## Tender measures

* 1. Information below shows the types and number of measures that the project is going to install. The tender return will include installers capacity and ability to fill these measures. Severn Wye has a strict pricing structure from the HUG2 project which we need to meet, therefore install prices will be factored into our decision.
  2. Severn Wye are looking for Installers who are able to provide measures within the scope of the project. Severn Wye reserve the right to change measures and there is no guarantee of capacity fulfilment due to the responsive nature of the scheme. We are not looking for one installer to install all measures in each category and to mitigate risks we will award work across multiple contractors. In the tables below please enter on how many you are able to complete as per criteria and not for all of the categories.
  3. Please complete the spreadsheet titled “Installer prices” with prices for installs which can be included for different measures. Please include ALL costs including tanks/pipework. If there are additional costs including possible remedial or ancillary costs which may be incurred, please include these at the bottom of the spreadsheet.
  4. Eligible Expenditure is net of VAT recoverable by the grant recipient from HM Revenue & Customs, and gross of irrecoverable VAT. This means that all grants are outside the scope of VAT.
  5. Eligible installers will have the opportunity to review the Contract and SLA before signing
  6. The agreement also includes provision for preparing the Dwelling for the installation and making it good afterwards:
     1. Ancillary works – the project has budgeted for some ancillary works, but the cost per measure indicated in the ‘Installer prices’ spreadsheet must clearly outline what is included within that cost and itemise any other ‘ancillary works’ that are not included within the price.

The number of measures below relates to the total number of measures for completion by the project. We are excepting tenders for specific measures, numbers and combination of measures. **Please cross out those measures you are unable to provide.**

### Home Upgrade Grant – HUG Off gas delivery

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Measure Category** | **Measures** | **Expected Install capacity per month** | **Min capacity total** | **Max capacity total** |
| **A** 60% | Loft Insulation  External Wall Insulation  Internal Wall Insulation  Room in Roof Insulation  Flat Roof Insulation  Park Home Insulation  Draught Proofing  Air Source Heat Pumps  Ground Source Heat Pumps  Shared Loop Ground Source Heat Pumps  Communal Heat Networks  Wet Central Heating  Hot Water Cylinder Insulation  Hot Water Cylinder Thermostat  Digital/Smart Controls\*  Heating Controls  Battery Storage\* (only eligible when complementing Solar PV) |  |  |  |
| **B** 40% | Low energy lighting  Underfloor Insulation  Solar PV  High Temperature Heat Pumps  Low Carbon District Heating  Double Glazing (only when required by PAS 2035 to complement EWI or for the home to be PAS compliant) |  |  |  |
| **C** 10% | Biomass room heater with boiler  Solar Thermal C Biomass  Direct Electric Heaters  High Retention Storage Heaters  Double Glazing (when not required by PAS to complement EWI nor for the home to be PAS compliant) |  |  |  |

## Data Privacy Statement

This statement sets out how the data you submit (with particular reference to personal data contained) within your application will be used and protected.

* 1. For the purposes of data protection, Stroud District Council is the data controller and Severn Wye Energy Agency is the data processor responsible for collecting your data.
  2. Under the General Data Protection Regulation (GDPR), the lawful bases we rely on for processing this information are a) consent: much of this data is submitted voluntarily for the stated use; and b) public task: we are required to process your data in certain ways to comply with the requirements associated with public funds, including evaluation, audit and prevention of fraud.
  3. The information collected during the application process will be used for the sole purpose of assessing suitability to deliver the contract and in the case of the winning bid, the information will form the basis of the operational relationship.
  4. The information you submit will not be used for any other purpose (including the marketing of goods and services) and will not be shared with any third parties other than those stated below.
  5. As this contract forms part of a publicly funded project, your data may be shared with Stroud District Council (the Data Controller) and the Department for Business, Energy and Industrial Strategy (the funder).
  6. Your data will be securely stored on Severn Wye’s Microsoft Sharepoint servers, all based inside the EEA. Any hard copies of your data are stored securely at Severn Wye’s headquarters. We will hold this information for a maximum of twenty-five years following the completion of the funding scheme in order to comply with any audit requirements associated with the use of public funds.
  7. The personal data of referees included with the application will be kept for a maximum of twenty five years following the completion of the funding scheme in order to comply with any audit requirements associated with the use of public funds.

## Contractor information

|  |  |
| --- | --- |
| **Potential Installer information** | |
| **Question** | **Response** |
| Full name of the organisation submitting the information |  |
| Name of person filling in information |  |
| Position within organisation |  |
| Registered office address (if applicable) |  |
| Registered Trading address (if applicable) |  |
| Registered website address (if applicable) |  |
| Trading status:   * public limited company * limited company * limited liability partnership * other partnership * sole trader * third sector * other (please specify your trading status) |  |
| Date of company registration with Companies House |  |
| Company registration number (if applicable) |  |
| Charity registration number (if applicable) |  |
| Registered VAT number |  |
| Are you registered for PAS2030:2019 as this trading entity, **OR** are you registered under an umbrella of another organisation? |  |
| What is your PAS certification number? |  |
| Which measures does your PAS2030:2019 certification cover and what is the expiry date? |  |
| Are there any instances where your Retrofit Coordinators are not qualified to work with specific buildings or circumstances?’? |  |
| Is your organisation registered with TRUSTMARK? If so, what is your registration number? |  |
| Information Commissioners Office (ICO) Registration Number |  |
| Trading name(s) that will be used if successful in this procurement |  |
| Are you registered for ECO4? If so, please provide details and measures covered |  |

**Please now complete the separate spreadsheet (‘Installer prices’) for prices to complete work in the projects measures and return with your application. We will use this information to evidence to DESNZ cost effectiveness of measures and we can compare and score applications and additional costs. Please send your pricing structure if available.**

## Additional information required

|  |  |
| --- | --- |
| Have you previously worked with Severn Wye in the last 5 years? If so, in what capacity, or on which projects? |  |
| At Severn Wye we take our clients privacy seriously and use a secure Customer Relationship Management (CRM) System.  Have you used CRM systems in the past to share information with companies especially Charity Log? If so, please detail systems you use and/or your experience of such systems. |  |
| Provide two references who we can contact to confirm the quality and capacity of your work  [See Data Privacy Statement](#_Data_Privacy_Statement) | Name (Person)  Organisation  Address  Contact details  Email / phone |
| Name (Person)  Organisation  Address  Contact details  Email / phone |
| Are there any sub-contractors that you are proposing to work with? If so, please detail. In addition, specify whose PAS 2030:2019 certification they will be operating under. |  |
| Please let us know how you plan to support vulnerable clients (max 100 words) |  |
| Please let us how you protect client personal information (max 100 words) |  |
| Please let us know how you will ensure quality of delivery to include sub contactors (max 100 words) |  |
| Please let us know how many of your staff hold professional qualifications and what they are (max 100 words) |  |
| Please let us know how you respond to client queries and complaints (max 100 words) |  |

## Next steps

If your application is successful to the next stage, the organisation will be sent an MOU and SLA for completion and signing.

|  |  |
| --- | --- |
| **Self-Declaration** | |
| **In submitting this application:** | **We confirm our understanding and comply:** |
| 1. We confirm that, to the best of our knowledge, the information provided is fair and accurate and that we will inform Severn Wye if any information came to light which would materially impact the evaluation of the tender. | ☐ |
| 1. We understand that the decision regarding provision of funding is entirely at the discretion of Severn Wye and Stroud District Council.  Any funding provided is subject to contract. | ☐ |
| 1. We declare that we understand the application stage and customer journey will be completed by Severn Wye and if leads are identified they will be signposted to the Warm & Well Advice Line. | ☐ |
| 1. We understand that this tender implies no exclusivity, and the installer and Severn Wye shall be free to render services to others and to engage in other activities. | ☐ |

Signed on behalf of Company

Date

**Please return completed forms including ‘Installer Price’ spreadsheet to** [**FundingGlos@severnwye.org.uk**](mailto:FundingGlos@severnwye.org.uk)**.**