

UK-Shrewsbury: Repair and maintenance services of electrical machinery, apparatus and associated equipment.

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Section I: Contracting Authority

I.1) Name and addresses

Shropshire Council
Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND, United Kingdom

Contact: Procurement

NUTS Code: UKG22

I.2) Joint procurement

The contract involves joint procurement: No.

In the case of joint procurement involving different countries, state applicable national procurement law: Not provided

The contract is awarded by a central purchasing body: No.

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://www.delta-esourcing.com/tenders/UK-UK-Shrewsbury:-Repair-and-maintenance-services-of-electrical-machinery%2C-apparatus-and-associated-equipment./5TU98ZBVCH>

Additional information can be obtained from: the abovementioned address

Tenders or requests to participate must be sent electronically via <https://www.delta-esourcing.com/tenders/UK-title/5TU98ZBVCH> to the abovementioned address

Electronic communication requires the use of tools and devices that are not generally available.

Unrestricted and full direct access to these tools and devices is possible, free of charge, at: <https://www.delta-esourcing.com/tenders/UK-title/5TU98ZBVCH>

I.4) Type of the contracting authority

Regional or local authority

I.5) Main activity

General public services

Section II: Object

II.1) Scope of the procurement

II.1.1) Title: RMCB 040 - Maintenance and Repair of Assisted Living Equipment

Reference Number: RMCB 040

II.1.2) Main CPV Code:

50532000 - Repair and maintenance services of electrical machinery, apparatus and associated equipment.

II.1.3) Type of contract: SERVICES

II.1.4) Short description: The delivery of the works undertaken by the Contractor under this Contract shall enable the Council to discharge their responsibility of the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

The contract will be for the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.

The value stated is for the full duration of the contract.

II.1.5) Estimated total value:

Value excluding VAT: 600,000

Currency: GBP

II.1.6) Information about lots:

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV codes:

44115600 - Stairlifts.

II.2.3) Place of performance:
UKG22 Shropshire CC

II.2.4) Description of procurement: The delivery of the works undertaken by the Contractor under this Contract shall enable the Council to discharge their responsibility of the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

Lifts, ceiling track hoists, bath and stretchers complying with:

- 1)BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures.
- 2)BS 5965:1980 Specification for manually driven balanced personal home lifts.
- 3)BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification.
- 4)BS5776:1996 Specification for powered stairlifts

All work must comply with BS7255:2012 code of practice for Safe Working on Lifts and BS EN ISO 10535:2006 Hoists for the transfer of disabled persons.

These visits are to be within the months shown in the Schedule of Properties – Schedule 2 and shall not lapse the date given. Inspections are permitted to be undertaken up to 2 weeks early.

The contract will be for the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.

The value stated is for the full duration of the contract.

II.2.5) Award criteria:

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value:

Value excluding VAT: 600,000

Currency: GBP

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system:

Start: 01/06/2022 / End: 31/03/2027

This contract is subject to renewal: Yes

Description of renewals: 5 years

II.2.10) Information about variants:

Variants will be accepted: No

II.2.11) Information about options:

Options: No

Description of options: Not provided

II.2.12) Information about electronic catalogues:

Tenders must be presented in the form of electronic catalogues or include an electronic catalogue: No

II.2.13) Information about European Union funds:

The procurement is related to a project and/or programme financed by European Union funds:
No

Identification of the project: Not provided

II.2.14) Additional information: Not provided

Section III: Legal, Economic, Financial And Technical Information

III.1) Conditions for participation

III.1.1) Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions:

See tender documentation

III.1.2) Economic and financial standing

List and brief description of selection criteria:

See tender documentation

Minimum level(s) of standards possibly required (if applicable) :

See tender documentation

III.1.3) Technical and professional ability

List and brief description of selection criteria:

See tender documentation

Minimum level(s) of standards possibly required (if applicable) :

See tender documentation

III.1.5) Information about reserved contracts (if applicable)

The contract is reserved to sheltered workshops and economic operators aiming at the social and professional integration of disabled or disadvantaged persons: No

The execution of the contract is restricted to the framework of sheltered employment programmes:
No

III.2) Conditions related to the contract

III.2.1) Information about a particular profession

Execution of the service is reserved to a particular profession

Reference to the relevant law, regulation or administrative provision:

See tender documentation

III.2.2) Contract performance conditions

See tender documentation

III.2.3) Information about staff responsible for the performance of the contract

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract: Yes

Section IV: Procedure

IV.1) Description OPEN

IV.1.1) Type of procedure: Open

IV.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement - NO

In the case of framework agreements justification for any duration exceeding 4 years: Not
Provided

IV.1.6) Information about electronic auction:

An electronic auction will be used: No

Additional information about electronic auction: Not provided

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: No

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure:

Notice number in the OJ S: Not provided

IV.2.2) Time limit for receipt of tenders or requests to participate

Date: 23/03/2022

IV.2.4) Languages in which tenders or requests to participate may be submitted: English,

IV.2.6) Minimum time frame during which the tenderer must maintain the tender:

Duration in month(s): 3

IV.2.7) Conditions for opening of tenders:

Date: 23/03/2022

Time: 12:00

Place:

Shrewsbury

Section VI: Complementary Information

VI.1) Information about recurrence

This is a recurrent procurement: Yes

Estimated timing for further notices to be published: 5 years

VI.2) Information about electronic workflows

Electronic ordering will be used No

Electronic invoicing will be accepted No

Electronic payment will be used No

VI.3) Additional Information: For more information about this opportunity, please visit the Delta eSourcing portal at:

<https://www.delta-esourcing.com/tenders/UK-UK-Shrewsbury:-Repair-and-maintenance-services-of-electrical-machinery%2C-apparatus-and-associated-equipment./5TU98ZBVCH>

To respond to this opportunity, please click here:

<https://www.delta-esourcing.com/respond/5TU98ZBVCH>

VI.4) Procedures for review

VI.4.1) Review body:

Shropshire Council

Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND, United Kingdom

VI.4.2) Body responsible for mediation procedures:

Not provided

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures:

Not Provided

VI.4.4) Service from which information about the lodging of appeals may be obtained:

Shropshire Council

Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND, United Kingdom

VI.5) Date Of Dispatch Of This Notice: 21/02/2022

Shropshire Council
Shirehall
Abbey Foregate
Shrewsbury
Shropshire SY2 6ND

Date: 21st February 2022
My Ref: RMCB 040
Your Ref: RMCB 040

Dear Bidder

**RMCB 040 - MAINTENANCE AND REPAIR OF ASSISTED LIVING EQUIPMENT
SHROPSHIRE COUNCIL**

You have been invited to tender for the above requirement. With this letter please find copies of the following documents:

- Instructions to Tendering (for completion and return)
- Tender Response Document (for completion and return)
- Appendix A - Servicing Schedule
- Appendix B - Staff Experience Form
- Schedule of Properties - Schedule 2
- Specification
- Draft Contract

Tenders should be made on the enclosed Tender Response Document. Your Tender must be completed, signed and returned along with a signed copy of the instructions for tendering through our Delta Tenderbox. Please pay particular attention to the points below concerning the returning of tenders.

Returning of Tenders

- The deadline for returning tenders is **noon on 23rd March 2022** any tenders received after this time will not be accepted
- Tenders are to be submitted through Delta, our electronic tender portal
- **Please ensure that you allow yourself at least two hours when responding prior to the closing date and time**, especially if you have been asked to upload documents. If you are uploading multiple documents you will have to individually load one document at a time or you can opt to zip all documents in an application like WinZip. Failure to submit by the time and date or by the method requested will not be accepted.
- **Once you upload documentation ensure you follow through to stage three and click the 'response submit' button. Failure to do so, will mean the documents won't be viewable by the Council**

Tenders **cannot** be accepted if:

- Tenders are received by post, facsimile or email
- Tenders are received after **12 noon on the given deadline**

Freedom of Information

Under the provisions of the Freedom of Information Act 2000 from 1 January 2005, the public (included in this are private companies, journalists, etc.) have a general right of access to information held by public authorities. Information about your organisation, which Shropshire Council may receive from you may be subject to disclosure, in response to a request, unless one of the various statutory exemptions applies.

Therefore if you provide any information to Shropshire Council in the expectation that it will be held in confidence, you must make it clear in your documentation as to the information to which you consider a duty of confidentiality applies. The use of blanket protective markings such as "commercial in confidence" will no longer be appropriate and a clear indication as to what material is to be considered confidential and why should be given.

Other Details

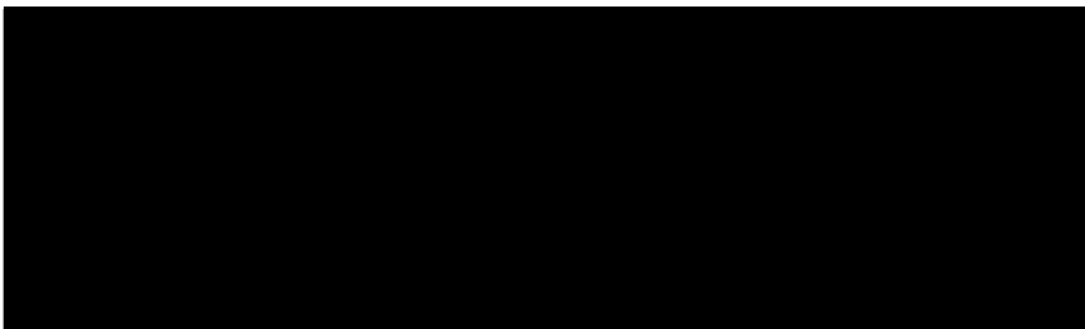
Please note that if supplementary questions are raised by any tenderer prior to the closing of tenders and Shropshire Council decides that the answers help to explain or clarify the information given in the Tender Documents, then both the questions and the answers will be circulated to all enterprises invited to submit a tender. Please raise all clarification questions before the deadline of **16th March 2022**.

Shropshire Council is purchasing on behalf of itself and any wholly owned local authority company or other entity that is deemed to be a contracting authority by virtue of the Council's involvement

Please also note that Shropshire Council is committed to achieving Social Value outcomes through maximising the social, economic and/or environmental impact of all its procurement activity. Specific requirements for this contract are set out within the Tender Response Document and in addition for your further information the council's Social Value Framework guidance can be found at www.shropshire.gov.uk/doing-business-with-shropshire-council.

If you have any queries relating to this invitation to tender, please contact us through the Delta e-tendering portal.

Yours faithfully





INSTRUCTIONS FOR TENDERING

**RMCB 040 - MAINTENANCE AND
REPAIR OF ASSISTED LIVING
EQUIPMENT**

Shropshire Council Instructions for tendering

Contract Description:

The delivery of the works undertaken by the Contractor under this Contract shall enable the Council to discharge their responsibility of the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

Lifts, ceiling track hoists, bath and stretchers complying with:

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1.0 Invitation to Tender

- 1.1** You are invited to tender for the Maintenance and Repair of Assisted Living Equipment as detailed in the Tender Response Document. The contract will be for the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.
- 1.2** Tenders are to be submitted in accordance with the draft contract of Shropshire Council, and the instructions outlined within this document.
- 1.3** Tenders must be submitted in accordance with the following instructions. Tenders not complying in any particular way may be rejected by Shropshire Council (the Council) whose decision in the matter shall be final. Persons proposing to submit a Tender are advised to read the Invitation to Tender documentation carefully to ensure that they are fully familiar with the nature and extent of the obligations to be accepted by them if their Tender is accepted.
- 1.4** The Invitation to Tender documents must be treated as private and confidential. Tenderers should not disclose the fact that they have been invited to tender or release details of the Invitation to tender document other than on an “in confidence” basis to those who have a legitimate need to know or who they need to consult for the purpose of preparing the tender as further detailed in these Instructions for Tendering.
- 1.5** Tenderers shall not at any time release information concerning the invitation to tender and/or the tender documents for publication in the press or on radio, television, screen or any other medium without the prior consent of the Council.
- 1.6** The fact that a Tenderer has been invited to submit a tender does not necessarily mean that it has satisfied the Council regarding any matters raised in the pre-tender questionnaire submitted. The Council makes no representations regarding the Tenderer’s financial stability, technical competence or ability in any way to carry out the required services. The right to return to any matter raised in any pre-tender questionnaire submitted as part of the formal tender evaluation is hereby reserved by the Council.
- 1.7** The Invitation to Tender is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a tenderer to submit a tender or enter into a Contract or any other contractual agreement.
- 1.8** Shropshire Council is purchasing on behalf of itself and any wholly owned local authority company or other entity that is deemed to be a contracting authority by virtue of the Council’s involvement.

2.0 Terms and Conditions

- 2.1** Every Tender received by the Council shall be deemed to have been made subject to the draft contract and these Instructions for Tendering unless the Council shall previously have expressly agreed in writing to the contrary.

- 2.2** The Tenderer is advised that in the event of their Tender being accepted by the Council, they will be required to undertake the required services.

3.0 Preparation of Tenders

3.1 Completing the Tender Response Document

- 3.1.1** Tenders should be submitted using the 'Tender Response Document' following the instructions given at the front of the document. The Tenderer's attention is specifically drawn to the date and time for receipt of Tenders and that no submission received after the closing time will be considered.

- 3.1.2** All documents requiring a signature must be signed;

- a) Where the Tenderer is an individual, by that individual;
- b) Where the Tenderer is a partnership, by two duly authorised partners;
- c) Where the Tenderer is a company, by two directors or by a director and the secretary of the company, such persons being duly authorised for the purpose.

- 3.1.3** The Invitation to Tender Documents are and shall remain the property and copyright of the Council

3.2 Tender Preparation and Costs

- 3.2.1** It shall be the responsibility of Tenderers to obtain for themselves at their own expense all information necessary for the preparation of their Tender. No claim arising out of want of knowledge will be accepted. Any information supplied by the Council (whether in the Tender Documentation or otherwise) is supplied only for general guidance in the preparation of tenders.

- 3.2.2** Any Tenderer considering making the decision to enter into a contractual relationship with the Council must make an independent assessment of the Tender opportunity after making such investigation and taking such professional advice as it deems necessary.

- 3.2.3** Tenderers will be deemed for all purposes connected with their Tender submission where appropriate to have visited and inspected the Council, its assets, all the locations in respect of the delivery of the services/supplies/works and to have satisfied themselves sufficiently as to the nature, extent and character of the services supplies/works sought, and the human resources, materials, software, equipment, machinery, and other liabilities and other matters which will be required to perform the contract.

- 3.2.4** The Council will not be liable for any costs incurred by Tenderers in the preparation or presentation of their tenders.

- 3.2.5** Tenderers are required to complete all pricing schedules in the Invitation to tender documents. The terms "Nil" and "included" are not to be used but a zero or figures must be inserted against each item. Unit rates and prices must be quoted in pounds sterling and whole new pence.

- 3.2.6** It shall be the Tenderer's responsibility to ensure that all calculations and prices in the Tender documentation are correct at the time of submission.

- 3.2.7** The Tenderer is deemed to have made him/herself acquainted with the Council's requirements and tender accordingly. Should the Tenderer be in any doubt regarding the true meaning and intent of any element of the specification he is invited to have these fully resolved before submitting his Tender. No extras will be allowed for any loss or expense involved through any misunderstanding arising from his/her failure to comply with this requirement.
- 3.2.8** Any Tender error or discrepancy identified by the Council may be drawn to the attention of the Tenderer who will be given the opportunity to correct, confirm or withdraw the Tender.
- 3.2.9** The Tender Documents must be treated as private and confidential. Tenderers should not disclose the fact that they have been invited to tender or release details of the Tender document other than on an In Confidence basis to those who have a legitimate need to know or whom they need to consult for the purpose of preparing the Tender.

3.3 Parent Company Guarantee

It is a condition of contract that if the tendering company is a subsidiary then its Ultimate Group/Holding Company must guarantee the performance of this contract and provide a letter to that effect signed by a duly authorised signatory of the Ultimate Group/Holding Company if requested to do so by the Council. Where the direct parent company cannot provide an adequate guarantee in the opinion of the Council, the Council will look to another group or associate company, with adequate assets, to be the guarantor. In cases where the contract is with a Joint Venture Company (JVC) or a Special Purpose Vehicle (SPV) company, which may have two or more parent companies and which may not be adequately capitalised or have sufficient financial strength on its own to support the risk and obligations it has under the contract, 'joint and several' guarantees / indemnities from the parent companies of the JVC or SPV may be sought.

3.4 Warranty

The Tenderer warrants that all the information given in their Tender and if applicable their Request to Participate Questionnaire is true and accurate. The information provided will be deemed to form part of any contract formed under this contract.

The Tenderer warrants that none of their current Directors have been involved in liquidation or receivership or have any criminal convictions

4.0 Tender Submission

- 4.1** Tenders must be submitted strictly in accordance with the letter of instruction accompanying this Invitation to Tender. Tenders must be submitted by the deadline of **noon, 23rd March 2022**.
- 4.2** No unauthorised alteration or addition should be made to the Specification and Tender Response Document, or to any other component of the Tender document. If any such alteration is made, or if these instructions are not fully complied with, the Tender may be rejected.
- 4.3** Qualified tenders may be submitted, but the Council reserves the right not to accept any such tender. The Council's decision on whether or not a Tender is acceptable will be final.

4.4 Tenderers should note that their Tender must remain open and valid and capable of acceptance for a period of at least 90 days.

4.5 Tenderers should note that Tenders and supporting documents must be written in English and that any subsequent contract, which may or may not be entered into, its formation, interpretation and performance, shall be subject to and in accordance with the laws of England and subject to the jurisdiction of the Courts of England and Wales.

4.6 Where Tender submissions are incomplete the Council reserves the right not to accept them.

5.0 Variant Bids

5.1 The Council is interested in alternative solutions which would provide and develop opportunities for savings in service costs, service improvement or other financial benefits. In particular, the Council wishes to encourage solutions which also deliver benefits and added value to the local economy, residents and the business community.

5.2 Tenderers may submit, at their discretion, a Tender offering a different approach to the project as a "Variant Bid". However, to permit comparability, at least one bid must be submitted strictly in accordance with the Invitation to Tender Documents (the "Compliant Tender"). Any Tender variant proposed must clearly state how it varies from the requirements of the Compliant Tender Documents, and be explicit in demonstrating the benefits that will accrue to the Council from adopting this approach. Tenderers will be required to identify which submission, in their view, demonstrates best value to the Council.

5.3 Variant Bids must contain sufficient financial and operational detail to allow any Variant Bid to be compared with the standard Tender, permitting its considerations in written form.

6.0 Tender Evaluation

6.1 The Tenderers may be called for interview to seek clarification of their tender or additional or supplemental information in relation to their tender. The presentations will not carry any weighting to the final score achieved by Tenderers, but will be used to clarify and moderate issues raised in the Tenderer's submissions. Any areas of discrepancy between submissions and information gained from the presentations will be reviewed and scores previously awarded will be amended if necessary.

6.2 If the Council suspects that there has been an error in the pricing of a Tender, the Council reserves the right to seek such clarification, as it considers necessary from the Tenderer in question.

7.0 Clarifications

7.1 Tenderers are responsible for clarifying any aspects of the tendering process and/or the Invitation to Tender documents in the manner described below.

7.2 If you are unsure of any section and require further clarification, please contact via our Delta Tenderbox.

- 7.3** Where appropriate, the Authorised Officer named above may direct the Tenderer to other officers to deal with the matter.
- 7.4** All queries should be raised as soon as possible (in writing), in any event not later than **16th March 2022**.
- 7.5** All information or responses that clarify or enhance the tendering process will be supplied to all Tenderers on a uniform basis (unless expressly stated otherwise). These responses shall have the full force of this Instruction and where appropriate the Conditions of Contract. If a Tenderer wishes the Council to treat a question as confidential this must be expressly stated. The Council will consider such requests and will seek to act fairly between the Tenderers, whilst meeting its public law and procurement duties in making its decision.
- 7.6** Except as directed in writing by the Authorised Officer, and confirmed in writing to a Tenderer, no agent or officer or elected Member (Councillor) of the Council has any express or implied authority to make any representation or give any explanation to Tenderers as to the meaning of any of the Tender Documents, or as to anything to be done or not to be done by a Tenderer or to give any warranties additional to those (if any) contained in the ITT or as to any other matter or thing so as to bind the Council in any way howsoever.
- 8.0 Continuation of the Procurement Process**
- 8.1** The Council shall not be committed to any course of action as a result of:
- i) issuing this Invitation to Tender;
 - ii) communicating with a Tenderer, a Tenderer's representative or agent in respect of this procurement exercise;
 - iii) any other communication between the Council (whether directly or through its agents or representatives) and any other party.
- 8.2** The Council reserves the right at its absolute discretion to amend, add to or withdraw all, or any part of this Invitation to Tender at any time during the tendering stage of this procurement exercise.
- 8.3** At any time before the deadline for receipt of tender returns the Council may modify the Invitation to Tender by amendment. Any such amendment shall be numbered and dated and issued by the Council to all participating tenderers. In order to give prospective Tenderers reasonable time in which to take the amendment into account in preparing its Tender return, the Council may in its sole discretion, extend the deadline for submission of the tender returns. The Council reserves the right to amend, withdraw, terminate or suspend all or any part of this procurement process at any time at its sole discretion.
- 9.0 Confidentiality**
- 9.1** All information supplied by the Council in connection with or in these Tender Documents shall be regarded as confidential to the Council unless the information is already within the public domain or subject to the provisions of the Freedom of Information Act 2000.

- 9.2** The Contract documents and publications are and shall remain the property of the Council and must be returned upon demand.
- 9.3** Tenderers shall ensure that each and every sub-contractor, consortium member and/or professional advisor to whom it discloses these papers complies with the terms and conditions of this ITT.
- 9.4** The contents of this Invitation to Tender are being made available by the Council on condition that:
- 9.4.1** Tenderers shall at all times treat the contents of the Invitation to tender and any related documents as confidential, save in so far as they are already in the public domain and Tenderers shall not, subject to the provisions relating to professional advisors, sub-contractors or other persons detailed below, disclose, copy, reproduce, distribute or pass any of the contents of the Invitation to tender to any other person at any time or allow any of these things to happen;
- 9.4.2** Tenderers shall not use any of the information contained in this Invitation to tender for any purpose other than for the purposes of submitting (or deciding whether to submit) the tender; and
- 9.4.3** Tenderers shall not undertake any publicity activity within any section of the media.
- 9.5** Tenderers may disclose, distribute or pass this Invitation to tender to their professional advisors, sub-contractors or to another person provided that:
- 9.5.1** this is done for the sole purpose of enabling an Invitation to tender to be submitted and the person receiving the Information undertakes in writing to keep the Invitation to Tender confidential on the same terms as if that person were the Tenderer; or
- 9.5.2** the Tenderer obtains the prior written consent of the Council in relation to such disclosure, distribution or passing of the Invitation to Tender; or
- 9.5.3** the disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement or to any Contract(s) which may arise from it; or
- 9.5.4** the Tenderer is legally required to make such a disclosure.
- 9.6** The Council may disclose detailed information relating to the Invitation to Tender to its officers, employees, agents, professional advisors or Governmental organisations and the Council may make any of the Contracts and procurement documents available for private inspection by its officers, employees, agents, professional advisors, contracting authorities or Governmental organisations.

9.7 Transparency of Expenditure

Further to its obligations regarding transparency of expenditure, the Council may be required to publish information regarding tenders, contracts and expenditure to the general public, which could include the text of any such documentation, except for any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act to be determined at the absolute discretion of the Council.

10.0 Freedom of Information

- 10.1** Please note that from 1 January 2005 under the provisions of the Freedom of Information Act 2000, the public (included in this are private companies, journalists, etc.) have a general right of access to information held by public authorities. One of the consequences of those new statutory responsibilities is that information about your organisation, which Shropshire Council may receive from you during this tendering process may be subject to disclosure, in response to a request, unless one of the various statutory exemptions applies.
- 10.2** In certain circumstances, and in accordance with the Code of Practice issued under section 45 of the Act, Shropshire Council may consider it appropriate to ask you for your views as to the release of any information before we make a decision as to how to respond to a request. In dealing with requests for information under the Act, Shropshire Council has to comply with a strict timetable and it would therefore expect a timely response to any such consultation within five working days.
- 10.3** If, at any stage of this tendering process, you provide any information to Shropshire Council in the expectation that it will be held in confidence, then you must make it clear in your documentation as to the information to which you consider a duty of confidentiality applies. The use of blanket protective markings such as “commercial in confidence” will no longer be appropriate and a clear indication as to what material is to be considered confidential and why should be given.
- 10.4** Shropshire Council will not be able to accept that trivial information or information which by its very nature cannot be regarded as confidential should be subject to any obligation of confidence.
- 10.5** In certain circumstances where information has not been provided in confidence, Shropshire Council may still wish to consult with you as to the application of any other exemption such as that relating to disclosure that will prejudice the commercial interests of any party. However the decision as to what information will be disclosed will be reserved to Shropshire Council.

For guidance on this issue see: <http://www.ico.gov.uk>

11.0 Disqualification

- 11.1** The Council reserves the right to reject or disqualify a Tenderer's Tender submission where:
- 11.1.1** The tenderer fails to comply fully with the requirements of this Invitation to tender or is in breach of clause 15 of the Council's General Terms and Conditions relating to Bribery and Corruption or is guilty of a serious or intentional or reckless misrepresentation in supplying any information required; or
- 11.1.2** The tenderer is guilty of serious or intentional or reckless misrepresentation in relation to its tender return and/or the procurement process.
- 11.1.3** The tenderer directly or indirectly canvasses any member, official or agent of the Council concerning the award of the contract or who directly or indirectly obtains or attempts to obtain information from any such person concerning any other Tender or proposed Tender for the services. The Canvassing Certificate must be completed and returned as instructed.
- 11.1.4** The Tenderer :

- a) Fixes or adjusts the amount of his Tender by or in accordance with any agreement or arrangements with any other person; or
- b) Communicates to any person other than the Council the amount or approximate amount of his proposed Tender (except where such disclosure is made in confidence in order to obtain quotations necessary for preparation of the Tender for insurance purposes); or
- c) Enters into an agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any Tender to be submitted; or
- d) Offers or agrees to pay or give or does pay or gives any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any Tender or proposed Tender for the services any act or omission.

11.2 Any disqualification will be without prejudice to any other civil remedies available to the Council and without prejudice to any criminal liability which such conduct by a Tenderer may attract. The Non-Collusive Tendering Certificate must be completed and returned as instructed.

11.3 The Council reserves the right to disqualify an Applicant from further participating in this procurement process where there is a change in the control or financial stability of the Tenderer at any point in the process up to award of a contract and such change of control or financial stability has a materially adverse effect on the Tenderer's financial viability or ability to otherwise meet the requirements of the procurement process.

12.0 E-Procurement

As part of its procurement strategy Shropshire Council is committed to the use of technology that can improve the efficiency of procurement. Successful Tenderers may be required to send or receive documents electronically. This may include purchase orders, acknowledgements, invoices, payment advices, or other procurement documentation. These will normally be in the Council's standard formats, but may be varied under some circumstances so as not to disadvantage small and medium suppliers.

13.0 Award of Contract

13.1 Award Criteria

The Award Criteria has been set out within the Tender Response Document accompanying this invitation to tender. The Council is not bound to accept the lowest or any Tender.

13.2 Award Notice

The Council will publish the name and addresses of the successful Tenderers where appropriate. The Contracting Authority reserves the right to pass all information regarding the outcome of the Tendering process to the Office of Fair Trading to assist in the discharge of its duties. Additionally, the Council will adhere to the requirements of the Freedom of Information Act 2000 and Tenderers should note this statutory obligation.

13.3 Transparency of Expenditure

Further to its obligations regarding transparency of expenditure, the Council may also be required to publish information regarding tenders, contracts and expenditure to the general public, which could include the text of any such documentation, except for any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act to be determined at the absolute discretion of the Council.

14.0 Value of Contract

Shropshire Council cannot give any guarantee in relation to the value of this contract.

15.0 Acceptance

15.1 Tenders must be submitted strictly in accordance with the terms of the Council's Invitation to Tender documentation and acceptance of the tender shall be conditional on compliance with this Tender Condition.

15.2 The Tender documentation including the Council's draft form of contract, the Tender Response document and these Instructions to Tender shall form the basis of the final binding agreement between the Contractor and the Council.

15.3 The Tenderer shall be prepared to commence the provision of the supply and services on the start date of the contract being 1st June 2022.

16.0 Payment Terms

Tenderers should particularly note that the principles governing public procurement require that, as far as is reasonably possible, payments for Goods, Works or Services are made after the provision. Therefore any indication of a pricing strategy within a Tender which provides for substantial payments at the outset of the Contract will be examined carefully to decide whether or not a Tender in such form can be accepted. If in the opinion of the Council such substantial payments appear excessive in relation to the requirements of the Contract the Council reserves, without prejudice to any other right to reject any Tender it may have, the right to require the Tenderer to spread such proportion of the costs as are considered excessive over the duration of the Contract.

17.0 Liability of Council

17.1 The Council does not bind himself to accept the lowest or any tender.

17.2 The Council does not accept any responsibility for any pre-tender representations made by or on its behalf or for any other assumptions that Tenderers may have drawn or will draw from any pre-tender discussions.

17.3 The Council shall not be liable to pay for any preparatory work or other work undertaken by the Tenderer for the purposes of, in connection with or incidental to this Invitation to Tender, or submission of its Tender response or any other communication between the Council and any other party as a consequence of the issue of this Invitation to Tender.

17.4 The Council shall not be liable for any costs or expenses incurred by any Tenderer in connection with the preparation of a Tender return for this procurement exercise,

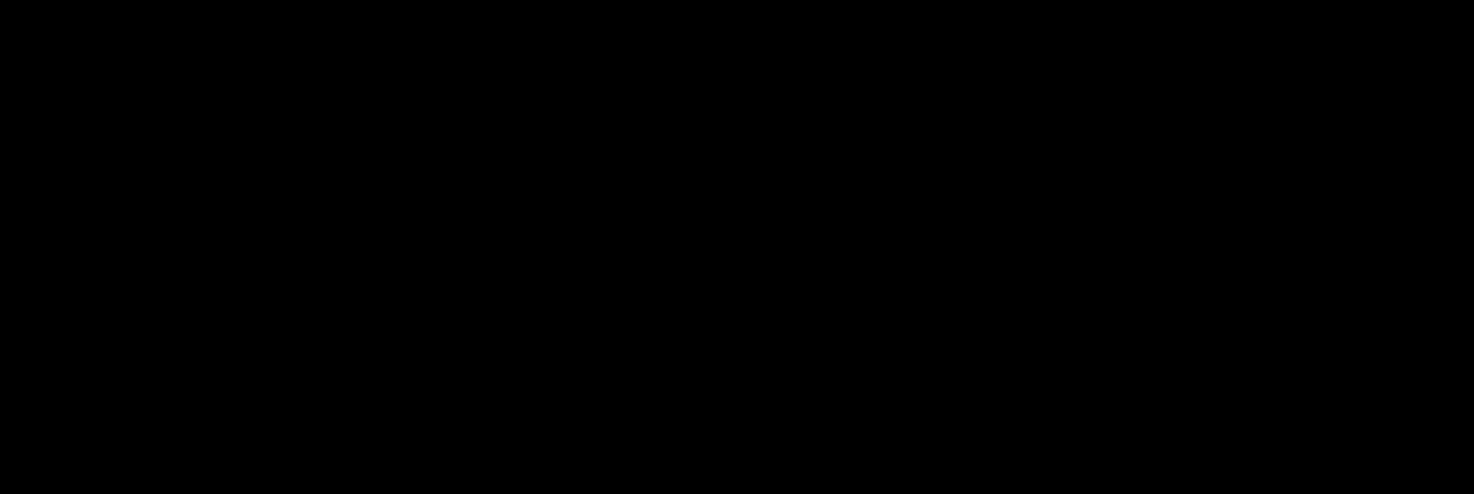
its participation in this procurement whether this procurement is completed, abandoned or suspended.

17.5 Whilst the Tender Documents have been prepared in good faith, they do not purport to be comprehensive nor to have been formally verified. Neither the Council nor any of its staff, agents, elected Members, or advisers accepts any liability or responsibility for the adequacy, accuracy or completeness of any information given, nor do they make any representation or given any warranty, express or implied, with respect to the Tender Documents or any matter on which either of these is based (including, without limitation, any financial details contained within the Specification and Contract Documentation). Any liability is hereby expressly disclaimed save in the event of fraud, or in the event of specific warranties provided within the Contract Documentation.

18.0 The Contractor agrees that where requested in writing during the term of any Agreement for the supply Goods Works or Services it will ensure that an appropriately authorised representative of the Contractor shall attend a Committee meeting of the Council upon being invited to do so by the Council

19.0 **Declaration**

We, as acknowledged by the signature of our authorised representative, accept that we have read and understood these Instructions to Tender and agree to be bound by them when submitting our tender response. We confirm that all the responses provided within our tender response are true and accurate and acknowledge and accept that, if successful in being appointed as the Contractor, our tender responses shall be included as part of the final binding agreement between the Contractor and the Council





RMCB 040
PPM/SC/EX09/2021
CONTRACT SPECIFICATION
DOCUMENT
MAINTENANCE AND REPAIR OF
ASSISTED LIVING EQUIPMENT

Prepared by: Nathan Davies
Shropshire Council
Property Services Group
January 2022

Version	Changes	Author
1.0	Aligned terminology with Legal Services	Nathan Davies

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GENERAL CONDITIONS

1.1 Definitions

The following definitions are in addition to the definitions contained in the main body of this Agreement:

“Agreed Prices”: refers to the prices submitted on the Tender Response Document Section C – Tender Schedule.

“Budget Holder”: refers to the person/s responsible for the individual budget assigned to each Property. The Council has delegated responsibility for most of the properties covered under the scope of this Agreement, however it remains the Contractor's responsibility to determine the individual arrangements for each property.

“Building Manager”: refers to the point of contact for the Property.

“Contract Administrator”: means the officer appointed by the Council to manage the contract evidenced by this Agreement

“Contract”: refers to the agreement entered into between the Council and the Contractor to execute the works referred to within this document.

“Contractor's Base”: refers to the Contractor's operational company address from which the works will be executed from.

“Contractor”: refers to the company or organisation contracted to provide the services specified.

“Council”: refers to Shropshire Council and any of its employees.

“COSHH”: means the Control of Substances Hazardous to Health.

“Method Statement” means a document which describes in a logical sequence exactly how a job is to be carried out in a way that secures health and safety and includes all the control measures.

“Normal Working Hours”: are defined as being between 08:00 and 17:00 Monday to Friday excluding any bank holidays

“Out of Hours”: refers to beyond the Normal Working Hours of Monday to Friday 08:00 to 17:00.

“Performance Monitoring System”: means the RAG system adopted by the Council as more particularly described in this specification.

“Property” and **“Properties”**: refers to the sites listed in Schedule 2 at which the services shall be delivered and within the context of this specification means in each case the entire premises where the inspection or repair work is to take place. This also covers the external and roof of the property or properties.

“RAMS”: means Risk Assessment and Method Statement.

“Service” or **“Services”**: refers to the Contractors carrying out reactive call outs or planned maintenance as part of the Servicing Schedule - Appendix A

“**Service Personnel**” refers to the Contractor’s staff executing the service works on site.

“**Skilled Person**” refers to a person who possesses, as appropriate to the nature of the works to be undertaken, adequate education, training and practical skill, and who is able to perceive risks and avoid hazards involved in the delivery of the works encompassed by this contract.

1.2 Contract Documentation

The specification must be read in conjunction with, and may be modified by, other documents comprising the full tender documentation.

1.3 General Contract Performance

The Council will operate a Performance Monitoring System for the Contractor working under this contract, to enable the recording of and act on, under performance in respect of performance, price and quality.

The system will be a RAG (Red, Amber, and Green) traffic light system for any works done under the scope of the contact, this is also to include day works. Where the Contractor who performs adequately and in accordance with the Council’s requirements it will be recorded as ‘Green’, The Contractor will start with a Green status by default.

The monitoring areas will generally be, but are not restricted to:

1. Health and Safety/Insurance
2. Quality of Workmanship
3. Programme
4. Cost
5. Attendance

Examples of issues that could lead to an Improvement, Registration of Concern or Warning Notice being raised are repeated instances of:- H & S lapses on sites, Failures to produce timely H & S Plans/Manuals, unacceptable work, poor workmanship, use of non-specified materials without authorisation, inadequate control of sub-contractors, lack of adequate services commissioning, insufficient provision of resources, **inadequate programming**, failure to adhere to timescales/sectional completions, failure to provide financial information, untimely provision of final accounts.

A rating status can be notified at any time during the project, but one will be recorded as a minimum at Practical Completion (if it is an Amber or Red, otherwise a Green will be assumed).

The system process steps are:

1. Improvement Notice - Issue to the Contractor an “Improvement (Amber) Notice” recording the issues and giving the opportunity to improve. Issue of an Improvement Notice will be by email or formal letter.
2. Registration of Concern - Issue to the Contractor a “Registration of (Amber) Concern” recording the issues and any previous Notifications and requiring immediate response to the issues raised and performance improvement. The Contractor may be asked to attend a formal meeting to explain the reasons for poor performance and provide mitigation. Issue of the ROC will be via email or formal letter.
3. Warning Notice - Issue to the Contractor a “Warning (Red) Notice” recording the issues, previous Notifications and requiring immediate improvement under threat of contract

termination, with a review period of six months or until improvement can be proven to the satisfaction of Council, whichever is the shorter period. It may also require the Contractor to attend a formal meeting to explain why no improvement has been made. Issue of Warning will be via email or formal letter.

4. Termination Notice - Issue to the Contractor a "Termination (Red) Notice" recording the issues, previous notifications and advising of termination of the contract. Issue will be via formal letter.

Under exceptional circumstances an issue may be notified and recorded which would warrant an immediate "Red" notification being issued, similarly two notifications in the same monitoring area can result in the same action.

Notwithstanding the above the recognised options available under the Terms & Conditions of contracts will still be available to the Council.

The RAG system will form part of the feedback process that will provide input into the Council's Key Performance Indicator system (KPI) together with Council Satisfaction feedback and Contract Administrator/Employers Agent evaluation.

1.4 General

The Contractor shall provide the Council with information to allow the Council to assess the competency of the Contractor and individual personnel carrying out the services. This shall include as a minimum requirement the names of the specific persons who may carry out the work. It shall also include details of the quality system operated by the Contractor.

The Contractor will obtain agreement from the Council before substituting alternative personnel before or during the contract.

The Contractor's tender should include a method statement for the work to be undertaken.

The Contractor's insurance arrangements must comply with the tender requirements and be in force before work is allowed to commence. The Contractor should make copies of the policies available for approval.

All work and procedures must adhere to relevant regulations, statutes and codes of practice.

The Contractor must comply with the Council's Health & Safety Policy. Failure to do so may result in immediate expulsion of Contractor personnel from the site.

All hazardous or inflammable materials brought onto site must be notified to the Council in compliance with the 'Control of Substances Hazardous to Health Regulations, 2002'. All hazardous waste generated during sampling must be removed from site by the Contractor in compliance with the 'Health and Safety at Work etc. Act 1974'.

All work and procedures shall be undertaken with due care to avoid damage to the contents and fabric of a property.

The Contractor is expected to exercise politeness, confidentiality and discretion during the course of the maintenance work. Results of the outcome of the services may only be divulged to the Council's representative and other persons nominated by the Council.

1.5 Important Notes

The Contractor shall be responsible for visiting each property to take its own measurements, site surveys, necessary particulars and shall make arrangements with Building Manager for gaining access to the relevant areas. Damage caused to any property by the Contractor in

gaining access to it or as a consequence of carrying out the services shall be made good at the Contractor's own expense to the satisfaction of the Council and where applicable (if a property is not under the control of the Council) the relevant Building Manager.

The Contractor shall have the means to comply with the terms of the contract, bearing in mind that the equipment within each property will be of a differing manufacture.

The Contractor shall ensure that its service personnel shall carry a range of tools, suitable access equipment, equipment access keys, calibrated test instruments and any other necessary equipment to perform the Contractor's duties satisfactorily.

The Contractor shall provide supervisory staff to regularly monitor the performance and quality of the work of its service personnel.

The Contractor shall include in the tendered costs those that will be incurred for any administrative duties such as photocopying, providing duplicate electronic reports and communication costs.

The Contractor shall familiarise themselves with the site and in particular to the problems of gaining access to the site. Damage caused to any property in gaining access to the site by the Contractor or persons servicing the Contractor shall be made good at the Contractor's own expense to the satisfaction of the Council.

The Contractor shall make good any damage caused to the property by the Contractor or persons servicing the Contractor during the contract at the Contractor's own expense to the satisfaction of the Council.

The Contractor shall ensure that it and its Contractor personnel and service personnel report to the main office of the property or main reception whenever they are visiting a property to 'book-in' and shall ensure that they 'book-out' when leaving a property on all occasions.

Asbestos Management Regulation - Contractors shall be aware that there is a mandatory requirement to read and sign the onsite Asbestos Register prior to the commencement of any work. All operatives working on the servicing and repair of equipment must be in possession of valid asbestos awareness training, copies of these training records are to be submitted to the Council. The Contractor is to exercise extreme caution and remain vigilant when working on heaters, as the internals of the units are likely to have been excluded from an asbestos management survey due to the non-intrusive nature of the inspections that the reports are generated from.

The Contractor must ensure that all employees working for the Contractor and any persons servicing the Contractor behave in a responsible and respectful manner to all employees of the premises or any persons attending the premises, to include the wearing of suitable, respectable clothing and identity passes.

The works undertaken by the contractor is being undertaken on active Council sites and as such the normal operation of the site(s) shall not be interfered with. Co-operation and liaison with the site manager about any schedule and limitations is imperative.

1.6 Hours of Work

Normal Daytime Hours are defined as: - 8am to 5pm Monday to Friday excluding Statutory and Bank Holidays. Please note there will be no additional costs applicable to the Council outside of normal working hours for servicing, as some sites may require working outside the normal daytime hours as defined.

1.7 Identity Passes

The Contractor shall ensure that all of its Contractor personnel and service personnel shall, at the Contractor's own expense, be provided with identification passes which meet the minimum acceptable standards of the Council. The identification passes shall contain a current photograph of the recipient together with his/her name, also the name of the company by which they are employed and having an authorisation signature, provided by a senior manager/director of that company. The passes should be encapsulated for protection and be available for inspection by premises staff or representatives of the Contract Administrator, at any time while the operative is on site.

1.8 General Health and Safety

The site shall be maintained as a clean area at all times free of any litter or debris. The Contractor shall ensure that all public areas and pathways are left clear and free of hazards at all times and leave the premises clean and tidy on completion of the work.

The Contractor shall provide suitable first aid facilities on site.

The Contractor shall ensure that all personnel are provided with, and instructed to wear, proprietary personal protective equipment (PPE) where and whenever there is a risk of injury, as deemed necessary by Risk assessment /Method Statement.

If the premises management agree to provide in-house toilet facilities, the Contractor shall ensure that such facilities and access to and from them, are maintained with all due care and 'left as found' on completion of the contract.

The contractor shall at all-time adopt the working practices as defined in the RAMS.

1.9 Covid-19

The successful contractor must provide a written risk assessment in relation to Covid-19 detailing all safety measures in place.

The successful contractor must adhere to all H&S Covid-19 measures in place at each property adhering to social distancing measures at all times where possible. If a face covering or PPE must be worn the successful contractor must provide these to their staff at no cost to the Council along with hand sanitisers and disinfectant wipes.

The successful contractor must ensure that their staff do not attend a property if they are feeling unwell, have a temperature, cough or are showing signs of Covid-19

1.10 Legislation

The Contractor's attention is drawn to the following Health, Safety and Welfare Legislation:

- The Health and Safety at Work Act 1974 (HASAWA)
- Workplace (Health, Safety and Welfare) Regulations 1992 (WHSWR)
- Management of Health & Safety at Work Regulations 1999 (MHSWR)
- Construction and Design Management Regulations 2015 (CDM)
- Lifting Operations & Lifting Equipment Regulations 1998 (LOLER)
- Personal Protective Equipment at Work Regulations 1992
- Personal Protective Equipment Regulations 2002
- Health and Safety (First Aid) Regulations 1981
- Control of Substances Hazardous to Health Regulations 2002 (COSHH)
- Electricity at Work Regulations 1989
- Regulatory Reform (Fire Safety) Order 2005 (RRFSO)

- Reporting of Injuries, Diseases & Dangerous Occurrences Regulations 2013
- Manual Handling Operations Regulations 1992
- Provision & Use of Work Equipment Regulations 1998 (PUWER)
- Control of Noise at Work Regulations 2005
- Environmental Protection Act 1990
- The Control of pollution Act 1989
- Confined Space Regulations 1997
- Working at Height Regulations 2005 (WAHR)
- The Control of Asbestos Regulations 2012
- F-Gas Regulations 2015
- Regulatory Reform (Fire Safety) Order 2005 (RRO)

This is not a complete list of the relevant legislation and is presented only as a guide to assist the Contractor.

1.11 Risk Assessments and Method Statements

The Contractor shall carry out a detailed and recorded "Risk Assessment" and 'Method Statement' for the works.

The Contractor's risk assessment shall identify what measures the Contractor needs to take to comply with the requirements and prohibitions imposed on him by or under the "relevant statutory provisions". This phrase covers the general duties in the Health and Safety at Work Act etc. 1974 and more specific duties in the various Acts and Regulations (including the Management of Health and Safety at Work Regulations) 1999 associated with Health and Safety at Work

The Contractor shall ensure that he undertakes a risk assessment and provides a method statement for his means of access to allow for inspection and testing.

All works shall be carried out in strict accordance with the requirements of "The Work at Height Regulations 2005.

The Contractor shall ensure that all service personnel are suitably trained and experienced and competent to work at height.

The Contractor is reminded that for certain hazardous operations, they will be required to prepare a method statement for the work. It is anticipated that such statements will include, where applicable 'the sequence and method of work'.

The Council will always require a method statement for the following types of work:-

- Demolition
- Steel erection
- Entry into confined spaces
- Handling and removal of asbestos
- Use of explosives (including cartridge tools)
- Roof works and other overhead work
- Contaminated sites or buildings
- Other high-risk activities may also require a Permit to Work

In many instances method statements can form the control measures required by risk assessment and the document can be accepted as such.

The Contractor must include COVID19 measures and submit RAMS for each Property on the Schedule of Properties - Schedule 2

1.12 Construction Phase Health and Safety Plan (CPP)

The Contractor shall provide a sufficiently detailed CPP that will demonstrate how the servicing element of the contract will be managed safely across all properties encompassed by the contract. Individual CPPs will not normally be required where the delivery of the services is to be undertaken at more than one location

For all works that fall under the scope of Construction (i.e. outside of servicing), as defined under the CDM regulations, the Contractor shall ensure that a specific CPP is available on site and reflects the safety arrangements relevant to that site. For example, protection of the public, exposure to asbestos, electricity and confined spaces, etc.

In addition, suitably developed RAMS will routinely be required for the servicing element and any additional works identified by servicing. These will be available on site.

1.13 Control of Substances Hazardous To Health

All chemicals to be used as part of the servicing and cleaning process of the delivery of the Services shall be advised to the Contract Administrator complete with all relevant COSHH Assessments and copies of the manufacturers Hazard Data Sheets for prior approval.

1.14 Disclosure and Barring Service (DBS)

All operatives working under this contract on site, must be in possession of a current enhanced DBS certificate. Written confirmation of compliance with this requirement must form part of the tender submission. Continual compliance with this requirement for the duration of the Contract is a strict mandatory requirement. Failure to comply will lead to termination of the Contract.

1.15 Data Protection

The Contractor shall in relation to the performance of his obligations under this Contract be contractually bound to the Council to act in a way which is consistent with the obligations of a public authority under the Data Protection Act 2018 and in particular the Principles of the Data Protection Act 2018.

The British Standard for the secure destruction of confidential material (BS EN 15713:2009) applies to confidential information in all its forms. It requires companies to dispose of confidential information by shredding or disintegration. Confidential materials include paper records, computer hard drives and CDs/DVDs.

Organisations must ensure that any documents containing confidential contract information must be disposed of in a manner that complies with BS EN 15713:2009 when transporting, storing and destroying documents.

The Data Protection Act 2018 introduced a requirement that all organisations that are contracted to provide services to the Council and that services includes processing of personal data are obliged to ensure secure storage of data.

The Contractor shall at all time during the terms of the Contract implement appropriate technical and organisational measures acceptable by the Council to protect any personal data being accessed or processed by unlawful processing of personal data and against accidental loss or destruction of or damage to personal data held or processed by the Contractor and

that the Contractor shall have taken all reasonable steps to ensure reliability of any of their staff which will have access to personal data processed as part of the contract.

The Contractor shall act only on the Council's instructions in relation to the processing of any personal data provided to the Contractor by the Council or on behalf or by the Council's employees or former employees.

Upon receipt of at least 7 days' notice the Contractor shall allow access to any relevant premises owned or controlled by the Contractor to inspect procedures described above and will, on the Council's request, prepare a report to the Council as to the Contractor's current technical and organisational measures used to protect any such personal data.

The Contractor shall consider all reasonable suggestions which the Council may put to the Contractor to ensure that the level of protection provided for personal data is in accordance with this document and make changes suggested unless the Contractor can prove to the Council reasonable satisfaction that they are not necessary to ensure on going compliance with the Contractor undertaking in the clauses stated above.

1.16 Business Continuity

The Contractor shall have fully considered Business Continuity arrangements and shall develop robust Business Continuity Plans to minimise any effects on the delivery of the Services in the event that the Contractor's resources or operations be compromised as a result of an unplanned or Force Majeure Event as described in clause 35 of this Agreement. The Contractor shall make available upon request for inspection its Business Continuity plans which, as a minimum, shall detail contingencies in the event of the loss of or reduction in, its staff, office facilities or IT infrastructure and craft operatives and/or sub-contractors and shall also give consideration to its supply chain management.

1.17 Access to Plant and Equipment

The Contractor shall supply all suitable equipment, including, but not restricted to, ladders, platforms, MEWPs, scaffolding and mobile units etc., to gain access to all plant & equipment at each of the Properties.

The Contractor shall ensure that their operatives are fully trained and competent to use the access equipment required and utilised to safely access areas required.

The Contractor shall allow in their costs, those that will be incurred by moving stored items to allow access to plant along with subsequent reinstatement.

No additional costs shall be charged by the Contractor for any of the above as they must be included within the Agreed Prices.

1.18 Transport

The Agreed Prices shall be deemed to include all transport and mileage costs for Contractor personnel delivering the services.

1.19 Recalls

Where the Council's Contract Administrator, following an inspection and test of the works and at its sole discretion, deems it necessary for the Contractor to repeat the services, the Contractor shall ensure that it returns to the applicable property to undertake the requested works within 28 days of being requested to do so at its own expense. Where recalls are necessary within a 28-day period, only one order number will be provided where applicable.

1.20 Hazardous Situations

Should a hazardous situation to the buildings occupants become apparent (i.e. failure of a system or electrical hazard), the appropriate service should be isolated and the situation drawn immediately to the Contract Administrator's attention by telephone on Shrewsbury (01743 281079).

1.21 Additions / Deletions of Properties

The Council may, during the contract wish to add or delete properties from the Schedule of Properties – Schedule 2. Any such additions or deletions shall be affected by giving the Contractor one months' notice in writing and shall be affected without penalty to the Council.

Any such additions must be charged at the same cost suited in the Agreed Prices.

1.22 Contract Adjustments

For the purpose of additions and deletions of properties, the amounts payable shall be adjusted by the tendered contract rates.

1.23 Authorisation of Work

All work to be carried out by the Contractor beyond the scope (i.e., repair work) of this specification and Servicing Schedule – Appendix A shall be authorised in advance by the Council and budget holder before the work is undertaken.

The Council reserves the right to seek competitive alternative quotations for any works that fall outside the scope of this Agreement.

1.24 Consumables

The Contract shall be deemed to be inclusive of all consumables and cleaning materials necessary to complete the requirements of the contract. Consumables are defined as all items of equipment, materials or components that have to be replaced on a regular basis.

1.25 Inspection of Work

The Contractor shall be required from time to time to partially dismantle and re-assemble any items of equipment upon request, as far as is reasonably practicable, to demonstrate the nature of the servicing work carried out and that the services have been completed in accordance with the manufacturers and Council requirements. This is to include making available any faulty items or items replaced for inspection indicating the nature of the fault. No costs shall be incurred to the Council for this element of the contract.

1.26 Liability for Accidents and Damage

The Contractor shall exercise reasonable care in carrying out its obligations and agrees to indemnify the Council in respect of all damage to property and injury to persons to the extent that such damage or injury arises directly from the Contractor's negligence. The Contractor's insurance shall provide a minimum indemnity cover of five million pounds per event and total liability shall be uncapped.

1.27 Service Routines and Frequency

The service routines outlined in the Servicing Schedule - Appendix A are to be read in conjunction with British Standards and industry guidelines. These defined routines prescribe the base standard and shall not preclude any requirements of relevant legislation, regulations, guidance and manufactures instructions. Contractor shall update the logbook on site upon completion of each breakdown and service.

1.28 Site Protection

The Contractor shall be responsible for the protection of the site, the works and the public against all theft, damage or injury and shall allow for all necessary watching and lighting for the security of the works and protection of the public at each property where it undertakes the services.

The Contractor shall also erect and maintain any necessary temporary barriers or other means to protect and prevent accidental or unauthorised approach to potentially hazardous areas, such as incomplete plant or partially dismantled work platforms, unfenced drops, treated floor areas, hot or chemical processes etc. and remove on completion.

1.29 Review Meetings

It is to be assumed that the Contractor's Contract Manager will be required to attend quarterly contract review meetings with the Contract Administrator at the Council's Headquarters, to discuss contract performance and any other matters deemed necessary. The frequency of these meeting may be reduced based upon the Council's requirements; the frequency may be increased to address areas of poor performance.

1.30 Delegation

The Contractor shall not delegate performance of the whole or any part of this contract to any person or company unless they have obtained the written permission of the Council.

Where permitted, delegation shall only be to another contractor on the Councils approved list and may only be on a short-term basis and in no circumstances shall it constitute more than 10% of the total scheduled contract works.

1.31 Items under warranty

If during the course of the delivery of the Services at a Property, the Contractors inspection of the Property, reveals items of new plant defective or incorrectly installed, the Contractor shall notify the Council as soon as reasonably practicable to enable the Council to advise the original installing contractor and to request that such defects be rectified under warranty.

1.32 Named Contacts and Service Personnel

The Contractor shall appoint and supply the details of a dedicated personnel to carry out the administrative duties required of the Contractor. The details are to be provided to the Council along with alternative details to cover leave and sickness.

Any changes to the service personnel used under this Contract shall be advised to the Council immediately, with the Contractor providing the Council details of their qualifications and DBS numbers.

1.33 Electrical Works

Any electrical work or work servicing and repairing electrical controls, components and wiring, shall be carried out by a Skilled Person in a manner to comply with B.S. 7671 Requirements for Electrical Installations – IEE wiring regulations as amended to date and BS5839-1 as amended to date.

All electrical works shall be in accordance with Shropshire Councils Standard Electrical Specification SP(E).

1.34 Workmanship Standards

All works executed under this contract shall be to standard expected by skilled person. The Council reserves the right to reject work at the Contractor's expense if the Council deems it to be unacceptable.

1.35 Freedom of information

The Contractor is to acknowledge that the Council is subject to the requirements of the FOIA and the Environmental Information Regulations and shall assist and cooperate with the Council to enable the Council to comply with its Information disclosure obligations.

2 SPECIFIC REQUIREMENTS

2.1 Scope of Contract

The delivery of the works undertaken by the Contractor under this Contract shall enable the Council to discharge their responsibility of the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

Lifts, ceiling track hoists, bath and stretchers complying with:

- 1) BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures.
- 2) BS 5965:1980 Specification for manually driven balanced personal home lifts.
- 3) BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification.
- 4) BS5776:1996 Specification for powered stairlifts
- 5) Definitions as given in BS EN 13015 Maintenance for lifts and escalators

All work must comply with BS7255:2012 code of practice for Safe Working on Lifts and BS EN ISO 10535:2006 Hoists for the transfer of disabled persons.

These visits are to be within the months shown in the Schedule of Properties – Schedule 2 and shall not lapse the date given. Inspections are permitted to be undertaken up to 2 weeks early.

The Contract shall comprise of the remedial works required to repair the existing equipment if found to be faulty **subject to the prior approval of the Budget Holder and Council** and shall be in accordance with clause 2.11

2.2 Duration of the Contract

Fixed price tenders are being invited to the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.

Prices submitted are for the period of 1st June 2022 – 31st March 2025, thereafter the contractor is entitled to submit a cost adjustment to the tendered figure for the potential 2 year extension that is in line with the Retail Price Index for the previous calendar year period as defined on the ONS website under the "RPI All Item: percentage change of 12 months data series", and which is subject to the approval by the Client. However, in any event, the Client reserves the right to negotiate with the Contractor any proposed increase in rate if in its opinion they are not justified.

The Council is entitled under the duration of this contract to amend the content of the scope of works, so as to encompass any regulatory or legislative changes that impact upon the equipment covered under the scope of this contract.

The Council reserves the right to terminate the contract based upon the criteria as detailed in clause 1.3 at any time during the contract period. A minimum of 1 months' notice shall be given by either party prior to termination of the contract.

2.3 Programme of Work:

The Repair and Maintenance of Assisted Living Equipment inspection shall be undertaken simultaneously. The visits shall be undertaken at the dates shown in the Schedule of Properties – Schedule 2.

Note, an extremely flexible workforce shall be required on this Contract with regards to hours of work, as a majority of schools, private homes and some Council buildings will require 05:30 or 06:00 am starts or after 5pm/Saturday access. Please note there will be no additional costs applicable to the Council for outside of normal working hours working.

2.3.1 Logbook

The Contractor shall provide a service logbook to remain at each property at no extra cost to the Council. the service a typed report containing the following information to the Contract Administrator:

1. Contractor's name and address
2. Emergency contact details for the Council
3. Property/Client number
4. Property/Client name
5. Type of service i.e. bi- annual or annual
6. Date of service
7. Time arrived on site
8. Time departed site
9. Make and model of equipment
10. Equipment serial number
11. Equipment electrical load
12. Date of installation
13. Results of the electrical tests performed as per the requirements of the Servicing Schedule – Appendix A.
14. Defects corrected
15. Signature of service engineer
16. Signature of a Responsible Officer on site

The successful contractor shall provide draft forms for approval.

2.4 Schedule of Properties

A Schedule of Properties – Schedule 2 document shall be issued as part of the tender documentation, and again each year upon agreeing to extend the Contract, detailing the properties that are to be covered under the scope of this Contract and detailing the number of units present (based upon current detail available, however this information is not binding and shall be used as a guide only).

2.5 Costs

2.5.1 Inspection and Testing

Please note Service unit cost are to be carried out in Normal Working Hours.

2.5.1.1 Bi-Annual Stairlifts and Vertical Lift Unit Cost

Bi-Annual Stairlift and Vertical Lifts Unit Cost – is the unit cost for a single Service for a stairlift or vertical lift.

2.5.1.2 Bi-Annual Ceiling Track and Mobile Hoists Unit Cost

Bi-Annual Ceiling Track and Mobile Hoist Unit Cost - is the unit cost for a single Service for a ceiling track or mobile hoist.

2.5.1.3 Bi-Annual Astor Bannerman and Kingcraft Stretchers or Baths Unit Cost

Bi-Annual Astor Bannerman and Kingcraft Stretchers and Baths Unit Cost - is the unit cost for a single Service for an Astor Bannerman or Kingcraft stretcher or bath.

2.5.2 Unrealistically Low Tendered Unit Costs

The Council reserves the right to reject any tender submission from a Contractor that cannot be justified as commercially viable.

2.5.3 Spares

Spares utilised for the provision of the services are to be charged at the declared mark-up rates from paid wholesale prices and installed utilising the agreed labour rates.

2.5.4 Dayworks

The below only applies to dayworks and shall not apply to any of the inspection processes. These are for any repair work executed under the terms of this contract. The rates are to be populated in the relevant section of the Tender Response Document.

2.5.5 Call Out Unit Costs

The fixed rates charged are to account for traveling to and from site, including any mileage costs, in addition to the first hour on site. These rates shall be fixed in accordance with 2.2 and 2.1. Recall out unit costs will be carried out in accordance with 1.19

The number of Call Out unit's costs charged to each breakdown call shall be kept to a minimum by ensuring that relevant spares are carried by Service Personnel attending site.

2.5.5.1 Hourly rates

The rates are to be populated in the relevant section of the Tender Response Document.

These rates are to cover time spent on site carrying out repair works for single service engineer. **The attendance of a second service engineer must be authorised by the Council prior to attending site.**

2.5.5.2 Travel time

This shall be charged in line with the relevant hourly rate.

The time allowed shall be reasonable to cover the journey time between the Contractor's base and the property where the works are executed.

2.5.5.3 Obtaining materials

No costs shall be charged for the time taken to obtain materials, with the exception of emergency repairs.

2.5.5.4 Mileage rate

Mileage shall be charged at 0.45p per mile, in line with HMRC's business mileage rate. The amount of mileage charged shall be in line with the distance between the Contractor's base and the property where the works are executed.

2.6 Staff Experience Form

The Contractor shall complete an individual Appendix B - Staff Experience Form for all supervisors and site operatives who may participate in maintenance or remedial works have competency to work on the systems detailed in section 2.1. Details of all engineer's qualifications and evidence of CPD relevant to the nature works covered in this Contract will be marked in Section C / Q2.8 of the Tender Response Document.

2.7 Access

The Contractor shall make access arrangements at least two working weeks in advance with the Building Manager of each property, giving notification that access to the property is required and to ensure that access will be available. The Building Manager shall be advised that access will be required to all rooms and areas containing Stairlifts, Hoists, Bath lifts, Bath hoists, Changing beds and Stretchers.

The Contractor shall make access arrangements for all breakdown calls they receive with the property before attending site to ensure access can be granted. All work referred to in this specification shall be carried out during the normal working day unless local arrangements are made. Such local arrangements shall not involve the Council in overtime payments to their own or Contractor's staff.

Please note that access for School properties will not be available during term time between the hours of 9am – 3.30 pm.

2.8 Service Vehicle Equipment List

The following equipment shall be carried as a minimum requirement for servicing and breakdowns:

2 x Replacement hoist straps.

2 x Stairlift remote controls.

Control cabling.

Replacement fuses.

2.9 Abortive Visit Charges

In line with the requirements of clause 2.7, abortive visits shall only be charged in line with the Agreed Prices (as declared in the Tender Response Document) and shall normally consist of a Call Out unit cost.

Failure to comply with this requirement will result of non-payment of abortive visit charges. A record of with whom contact was made with, will be required in order to sanction abortive visit charges. A record of with whom contact was made with, will be required in order to sanction abortive visit charges.

2.10 Spare Parts and Renewals

Rectification of highlighted defects shall only be undertaken in accordance with clause 1.19 and 1.22

The Contractor shall use only genuine manufacturer's spares, except where otherwise directed, with all removed equipment, lamps and batteries to be removed from site and correctly disposed of at the contractor's expense in line with relevant legislation.

Contractor's vehicles at the start of each day shall carry replacement parts as shown in the schedule of spare parts in section 2.8

The Contractor shall only use new spares, except when otherwise directed. Reconditioned parts are not acceptable, with the exception of no longer obtainable parts.

Random checks of replaced parts may be carried out by the Council. The Contractor shall reimburse the Council for any parts that have been changed and subsequently are found to be in working order.

The Council reserves the right to request copies of supplier's invoices to verify cost mark-up against trade price of materials used against the values stated in the Tender Response Document.

The Contractor shall ensure that they source all materials at the most competitive rates currently available to ensure best value at all times.

All replacement materials fitted shall be on a like for like basis if still available. Where materials are no longer obtainable, replacements shall match the original performance of the parts replaced to ensure the original design remains valid.

2.11 Live Working

A robust safe system of works shall be adopted at all times, as defined in produced RAMS, to minimise the dangers of any live working required during the inspection.

The guidance contained in HSG85 and Council's Electricity at Work within the Council's Premises Policy shall be adhered to at all times as a minimum.

2.12 Repairs at Time of Service

The Contractor shall, subject to obtaining Budget Holders permission, undertake remedial works to correct non-functioning equipment up to financial limit of £300.00 Repairs beyond this threshold will need to be subject to a written quotation as per clause 3.2. Any invoices received for repair works undertaken exceeding the threshold will be rejected and excess spend will not be paid.

Items of non-conformity to current standards shall not be undertaken at time of service and shall be subject to 3.2

3 SERVICE REPORTS

The Contract Administrator may, during the period of the contract, wish to amend the method of service reporting – i.e. uploading to the cloud

3.1 Service Reports

The Contractor shall submit electronically within 7 days of the service a typed report containing the following information to the Contract Administrator:

1. Contractor's name and address and emergency contact details
2. Property/Client number
3. Property/Client name
4. Type of service i.e. quarterly or bi- annual annually
5. Date of service

6. Time arrived on site
7. Time departed site
8. Make and model of equipment
9. Equipment serial number
10. Equipment electrical load
11. Date of manufacture
12. Statement on the general condition of the equipment
13. Supply cable size and type
14. Results of the electrical tests performed as per the requirements of the Servicing Schedule – Appendix A.
15. Defects found - a quotation for rectification must accompany the service report
16. Defects corrected
17. Speed of operation of R.C.D. at 100% and 500% rating
18. Signature of service engineer
19. Signature of a Responsible Officer on site
20. Logbook present and updated.

The successful contractor shall provide draft forms for approval.

The Council may, during the contract, wish to amend the method of service reporting i.e uploading to a different cloud basis

Hand-written reports will not be accepted

3.1.1 Repair Works

For all repair works executed, the Contractor shall submit with their invoice a worksheet detailing the works undertaken, accompanied with any required report forms as recommended in the relevant British Standards: i.e., Modification Certificate from BS5839-6:2019+A1:2020; Minor Works Certificate from BS7671:2018+A1:2020; this is not an exhausted list.

3.2 Quotations

For all works that fall out the scope of Service – i.e., repairs required, and are not undertaken at the time of service (subject to the requirements of 1.22 and 2.11), the Contractor shall submit with its service reports an itemised quotation.

The quotation must include a full breakdown of costs, showing individual costs for materials and labour, to enable the quotation to be evaluated fully.

Subject to budget holder approval, the Council will issue the Contractor with an official order number to proceed if deemed necessary.

The Contractor shall use the agreed day rates when preparing quotations to ensure best value to the Council and to enable procurement without seeking alternative quotations.

Notwithstanding the above, the Council reserves the right to seek alternative quotations to monitor the Contractors performance and competitiveness. The Council reserves the right to place orders with other suppliers for repair works if their quotations are deemed to offer preferential rates.

4 INVOICES & PAYMENT

Payment of invoices will be made in arrears following the submission of the electronic service report and invoice per property.

Payment will be made following the electronic submission of an invoice, on completion of the works and must be presented within 14 days following completion of works.

All Service invoices are to be upload per Property onto TF Cloud by the Contractor.

All invoices must clearly state the following information:

- Addressed to PSG, Shropshire Council
- Be on a company letterhead showing company name and address
- If VAT is chargeable, invoice to have a VAT registration number
- Site name, property number and address
- Official Order Number
- Name of person requesting the works
- Date and time of when the order was placed
- Date of visit
- Time arrived on site
- Time left site
- Sub-contractor's details if necessary/applicable
- List Materials used along with the cost for each item and mark up
- Worksheet signed by authorised person on site
- Repair invoices are to contain the Quotation/Tender reference stated on each invoice submitted.

Not adhering to stipulated criteria may lead to administration penalties.

The Council reserves the right to request copies of supplier's invoices to verify cost mark-up against trade price of materials used against the values stated in the Tender Response Document.

Payment terms shall be 30 days in accordance with Shropshire Council's standard terms and conditions.

5 KEY PERFORMANCE INDICATORS

The Council shall monitor the performance of the Contractor's delivery of the Contract. The Contractor shall meet the following targets on delivery:

Item to be monitored	Target to be met
Adherence to schedule of delivery	95%
Reports received within 7 days of inspection	95%
Invoices received within 14 days of inspection	95%
Accuracy of report documentation	95%
Breakdown calls resolved on first repair visit	80%
Breakdown calls not resolved on first repair visit are done so with three working days following initial call.	95%
Breakdown calls not resolved on first repair visit are done so with five working days following initial call. Note, major replacement works are excluded from this requirement.	100%
Meeting required response times for non-urgent breakdown calls	95%
Meeting required response times for urgent breakdown calls	95%

Avoidance of repeated call outs to faults of the same nature to the same system within 1 month of visit	95%
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The Council shall issue the Contractor, each calendar month, a report to highlight any overdue inspections based upon the Schedule of Properties – Schedule 2 document.

Failure to achieve the required targets shall result in the Council evoking the procedures laid down in section 1.3

6 INSPECTION PROCEDURES

The service work shall be carried out according to the provisions of the relevant British Standards and industry guidance.

The requirements of the inspection regime are detailed in the Servicing Schedule – Appendix A. The Servicing Schedule- Appendix A prescribes the base standard and shall not preclude any additional requirements of relevant legislation, regulations, guidance and manufactures instructions. Where relevant legislation, regulations, guidance and manufactures instructions are more onerous, they shall be adhered to at no extra cost to the Council.

7 CALL OUTS AND EMERGENCY REPAIRS

The Contractor shall be required to provide a 24-hour 365 day per year emergency breakdown service with a 2 hour response time. Answer phone services are not acceptable.

The Contractor shall be able to respond to instructions to attend an emergency breakdown by attending site within two hours from receipt of call from the Council.

Breakdowns shall be given priority over planned service visits and must be completed within 24 hours from receipt of a request from the Council, unless otherwise agreed with the Council.

For breakdowns reported during normal working hours the Contractor will be issued verbally with an order number, followed by an official order from the Council via email within 3 working days.

For breakdowns reported outside normal working hours the Contractor shall obtain an order number from the Council on the next working day.

The charges and rates for breakdowns and emergency breakdowns i.e., labour rates, materials and travelling rates, together with any special conditions, shall be as agreed in the Agreed Prices.

Where the Council considers the charges and special conditions excessive the whole tender may be disqualified.

The Contractor shall provide details of its out of hours contract personnel engaged to be available for the out of hours breakdown service. The details to be provided shall include names & contact numbers shall be available at the commencement date. The Contractor shall update such details to reflect any revisions immediately following any such revisions. The Contractor shall also re-confirm the contact details prior to each annual extension of this Agreement and prior to times of public holidays e.g., Easter, Christmas etc.

In the event of an out of hours call-out, the Contractor shall report to the Building Manager for the Council managed properties or Contract Administrator for private homes to advise if they are unable to complete a repair and inform that person of the course of action, they are taking i.e. obtaining replacement parts.

In the event of spares/parts not being available from stock or local suppliers the Contractor is to make arrangements for overnight delivery direct from the manufacturer to their agents.

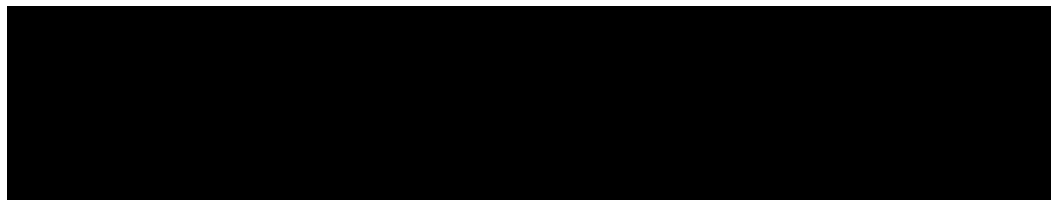
Random checks of replaced parts may be carried out by the Council. The Contractor shall reimburse the Council for any parts that have been changed and subsequently are found to be in working order.



Tender Response Document

RMCB 040 - MAINTENANCE AND REPAIR OF ASSISTED LIVING EQUIPMENT

Name of TENDERING
ORGANISATION
(please insert)



Please also add your company name to the footer of each page of the returned document



Shropshire Council Tender Response Document

Contract Description/Specification:

The delivery of the works undertaken by the Contractor under this Contract shall enable the Council to discharge their responsibility of the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

Lifts, ceiling track hoists, bath and stretchers complying with:

- 1) BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures.
- 2) BS 5965:1980 Specification for manually driven balanced personal home lifts.
- 3) BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification.
- 4) BS5776:1996 Specification for powered stairlifts

All work must comply with BS7255:2012 code of practice for Safe Working on Lifts and BS EN ISO 10535:2006 Hoists for the transfer of disabled persons.

These visits are to be within the months shown in the Schedule of Properties – Schedule 2 and shall not lapse the date given. Inspections are permitted to be undertaken up to 2 weeks early.

The contract will be for the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.



Instructions for the completion of this document

1. This document must be completed in its entirety with responses being given to all questions. If you are unsure of any section/question and require further clarification, please contact us via our Delta Tenderbox. You are recommended to keep a copy of all tender documents and supporting documents for your own records.
2. Tenderers must also complete and sign the four certificates in Sections A1 to A4. These must be signed;
 - a) Where the tenderer is an individual, by that individual;
 - b) Where the tenderer is a partnership, by two duly authorised partners;
 - c) Where the tenderer is a company, by two directors or by a director and the secretary of the company, such persons being duly authorised for the purpose.
3. All questions require specific responses from you relating to the organisation named in Section B Part 1 Question 1.1 (a). All information supplied must be accurate and up to date. The Council reserves the right to refuse to consider your application if the Tender Response Document is not fully completed or is found to be inaccurate.
4. Where copies of certificates and other details are requested **a copy must** accompany your tender response.

Contents

Section	Description	Page
A1	Form of Tender	8
A2	Non-Canvassing Certificate	9
A3	Non-Collusive Tendering Certificate	10
A4	Declaration of Connection with Officers or Elected Members of the Council	11
You must sign all 4 certificates in sections A1 to A4		
B Part 1	Supplier Information– For information only	13
B Part 2 Section 2	Grounds for <u>Mandatory</u> Exclusion	18
B Part 2 Section 3	Grounds for Discretionary Exclusion	20
Section C	Tender, Pricing and Social Value Schedule	28

Evaluation Criteria

Tenders will be evaluated on the answers provided in this 'Tender Response Document'. The following criteria is made up of 'pass/fail' (selection criteria) questions and 'weighted marked' (award criteria) questions and shows how each section is to be marked.

Selection Criteria Pass/Fail Questions (Section B)

This information will be provided for proof of compliance and will be judged on a pass or fail basis. Applicants must comply with these issues to demonstrate their proven competency, financial stability, resources and other arrangements. Questions marked 'For information only' will not be assessed; however they must still be answered in full.



Section / Question No.	Selection Criteria
Section B Part 1	Supplier Information– For information only
Section B Part 2 Section 2	Grounds for <u>Mandatory</u> Exclusion
Section B Part 2 Section 3 - 8	Grounds for Discretionary Exclusion

In relation to discretionary exclusion grounds (section B part 3):-

Financial viability: Responses will be analysed and evaluated by the Authority's Audit sections and will include checks via an independent agency (currently Equifax).

If the financial analysis of the Applicant (please note financial information provided by consortium members will be evaluated to assess the Applicant consortium as a whole) gives cause for concern as to its ability to deliver the Contract, the Applicant will fail this section.

If the financial analysis of the Applicant does not give any cause for concern as to its ability to deliver the Contract – it shall be deemed to have passed the section.

Please note the Contracting Authority reserves the right to further check the Financial Stability and Capacity of an applicant prior to any award of contract in the manner set out above in order to ensure that they still pass that requirement.

For other Discretionary exclusion grounds: If in the opinion of the Contracting Authority the responses provided casts serious doubt on the Tenderer's ability to perform this contract, they may be excluded.

Award Criteria – Weighted Marked Questions

Tenders will be evaluated on the answers provided in this Tender Response Document and judged against the criteria shown in the table below. The following award criteria is made up of 'Quality' and 'Price' and shows how each criteria is to be weighted against each other.

Section / Question No.	Award Criteria	Weighting / Max Marks Available
Price 40% (400 marks)		
Section C / Q 1.1	Price - Stairlift and Vertical Lift Unit Cost	100 max marks
Section C / Q 1.2	Price – Ceiling Track and Mobile Hoist Unit Cost	100 max marks
Section C / Q 1.3	Price – Stretchers and Baths Unit Cost	100 max marks
Section C / Q 1.4	Price - Daywork Rates	100 max marks
Total for price		400 max marks
Quality 50% (500 marks)		
Section C / Q 2.1	General Systems of operation	10 / 100 max marks
Section C / Q 2.2	Quality of Example service reports	5 / 50 max marks
Section C / Q 2.3	Quality of Example repair reports	5 / 50 max marks
Section C / Q 2.4	Quality of Example Logbook	4 / 40 max marks
Section C / Q 2.5	Quality of Risk assessments	2.5 / 25 max marks



Section C / Q 2.6	Quality of Method statements	2.5 / 25 max marks
Section C / Q 2.7	Quality of Quotation report	2.5 / 25 max marks
Section C / Q 2.10	Staff qualifications and experience	7.5 / 75 max marks
Section C / Q 2.11	Resources	6 / 60 max marks
Section C / Q 2.12	Quality assurance accreditations	2.5 / 25 max marks
Section C / Q 2.13	Data protection	2.5 / 25 max marks
	Total for quality	50 / 500 max marks
Social Value 10% (100 marks)		
Section C / Q 3.1	Social value	5 / 50 max marks
Section C / Q 3.2	Social fund proposal	5 / 50 max marks
	Total for social value	10 / 100 max marks

Price Evaluation and scoring

The most competitively priced tender will receive the maximum mark for price being **400**. **Less competitive tenders** will receive a % of the maximum mark that represents the difference in cost between that tender and the most competitively priced tender.

Section C 1.1 - 100 max marks

Bi-Annual Stairlift and Vertical Lift Unit Cost:

The most competitively priced bi-annual stairlift and vertical lift unit cost will receive the maximum mark for this question being **100**. Less competitive tenders will receive a % of the maximum mark that represents the difference in cost between that tender and the most competitively priced tender

This question will be evaluated as follows:

Submitted bi-annual unit costs will be multiplied to the number of assets contained within Schedule of Properties – Schedule 2 and multiplied by two, to provide the total annual Service cost.

The quantity of assets being.

Stairlifts – 82

Vertical Lifts - 3

Section C 1.2 - 100 max marks

Bi-Annual Ceiling Track and Mobile Hoist Unit Cost:

The most competitively priced bi-annual ceiling track hoist unit cost will receive the maximum mark for this question being **100**. Less competitive tenders will receive a % of the maximum mark that represents the difference in cost between that tender and the most competitively priced tender

This question will be evaluated as follows:

Submitted bi-annual unit costs will be multiplied to the number of assets contained within Schedule of Properties – Schedule 2 and multiplied by two, to provide the total annual Service cost.

The quantity of assets being.

Ceiling Track Hoists -10

Mobile Hoists - 10

Section C 1.3 - 100 max marks

Bi-Annual Astor Bannerman and Kingcraft Stretchers or Baths Unit Cost



The most competitively priced bi-annual Astor Bannerman and Kingcraft stretchers or baths unit cost will receive the maximum mark for this question being **100**. Less competitive tenders will receive a % of the maximum mark that represents the difference in cost between that tender and the most competitively priced tender

This question will be evaluated as follows:

Submitted bi-annual unit costs will be multiplied to the number of assets contained within Schedule of Properties – Schedule 2 and multiplied by two, to provide the total annual Service cost.

The quantity of assets being.

Stretchers - 2

Baths - 4

The above is as a guidance for scoring purposes only and is subject to change

Section C 1.4, Daywork rates - 100 max marks

The most competitively priced tender will receive the maximum mark for this question being **100**. Less competitive tenders will receive a % of the maximum mark that represents the difference in cost between that tender and the most competitively priced tender

This question will be evaluated as follows:

200 separate call outs which each take 3 hours on site time to complete with £75 trade price worth of additional material which the declared percentage mark-up will be applied. 160 of these calls will be during normal working hours, 20 will be "outside normal hours (Monday-Friday), 10 will be on a Saturday, 5 will be on a Sunday and 5 will be on a Bank holiday.

Section 2 - Quality Questions/ Scoring Scheme

Questions within the quality sections shown above will be scored using the following scoring scheme. Each answer from the questions identified below will be given a mark between 0 and 10 with the following meanings:

Assessment	Mark	Interpretation
Excellent	10	<i>Exceeds the requirement. Exceptional demonstration by the Tenderer of how they will meet this requirement by their allocation of skills and understanding, resources and quality measures. Response identifies factors that demonstrate added value, with evidence to support the response.</i>
	9	
Good	8	<i>Satisfies the requirement with minor additional benefits Above average demonstration by the Tenderer of how they will meet this requirement by their allocation of skills and understanding, resources and quality measures. Response identifies factors that demonstrate added value, with evidence to support the response.</i>
	7	
Acceptable	6	<i>Satisfies the requirement. Demonstration by the Tenderer of how they will meet this requirement by their allocation of skills and understanding, resources and quality measures, with evidence to support the response.</i>
	5	

Minor Reservations	4	<i>Satisfies the requirement with minor reservations Some minor reservations regarding how the Tenderer will meet this requirement by their allocation of skills and understanding, resources and quality measures, with limited evidence to support the response.</i>
	3	
Serious Reservations	2	<i>Satisfies the requirement with major reservations. Considerable reservations regarding how the Tenderer will meet this requirement by their allocation of skills and understanding, resources and quality measures, with little or no evidence to support the response.</i>
	1	
Unacceptable	0	<i>Does not meet the requirement Does not comply and/or insufficient information provided to demonstrate how the Tenderer will meet this requirement by their allocation of skills and understanding, resources and quality measures, with little or no evidence to support the response.</i>

The use of odd numbers indicates an answer's allocated mark lies between definitions.

The tender receiving the highest initial mark for Quality Criteria overall will receive the full 500 marks available for Quality. Other tenders will receive a final mark that reflects the final % difference in the initial marks between those tenders and the tender receiving the highest initial mark for Quality overall

Section 3 - Social Value Evaluation and Scoring

Proposals for delivery of Social Value in accordance with Shropshire Council's Social Value Framework will be scored using the scoring scheme applied to responses in the 'Quality' section of this tender response. Where we have not set out any particular measures for you to consider we will take into account the nature and proportionality of your Social Value commitment in relation to this contract. Where we have set out measures for you to consider we will take into account the extent to which your response meets these particular requirements.

We are also asking tenderers to make a cash contribution to a Social Value Fund which the Council will administer to support community-based initiatives aimed at improving the social wellbeing of Shropshire. The most competitive cash commitment will receive the maximum mark for Social Value being 5 / 50 marks. Less competitive tenders will receive a % of the maximum mark that represents the difference in cash commitment between that tender and the most competitive tender.

The tender receiving the highest initial mark for Social Value overall will receive the full 100 marks available for Social Value. Other tenders will receive a final mark that reflects the final % difference in the initial marks between those tenders and the tender receiving the highest initial mark for Social Value overall.



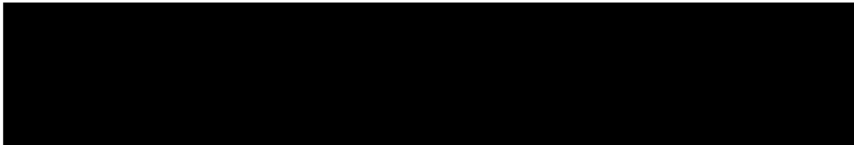
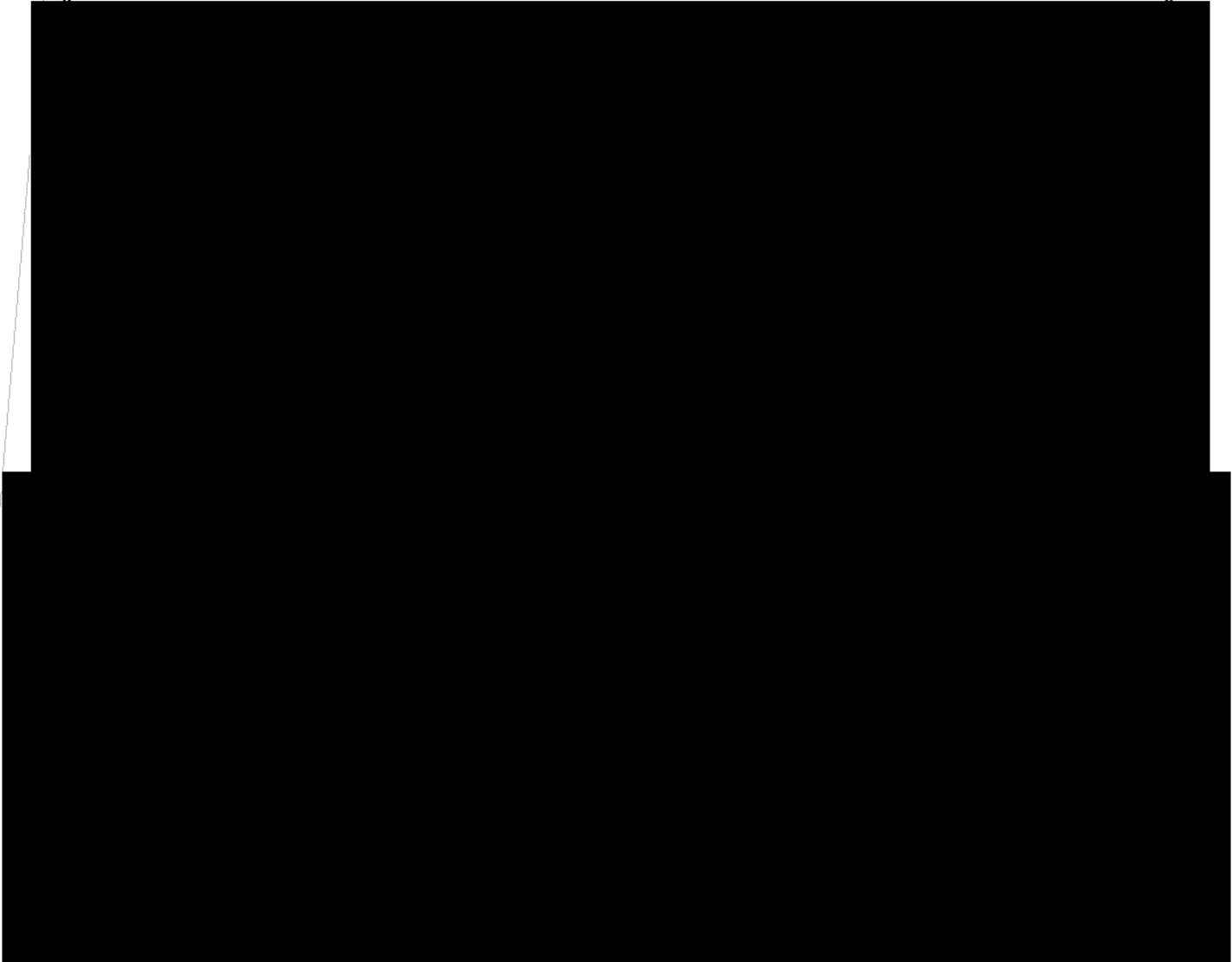
Section A:
1. Form of Tender

Form of Tender

Shropshire Council

Tender for Maintenance & Repair of Assisted Living Equipment

We confirm that this, our tender, represents an offer to Shropshire Council that if accepted in whole, or in part, will create a binding contract for the supply/provision of assisted living equipment at the prices and terms agreed and subject to the terms of the invitation to tender documentation and the Terms and Conditions, copies of which we have received.

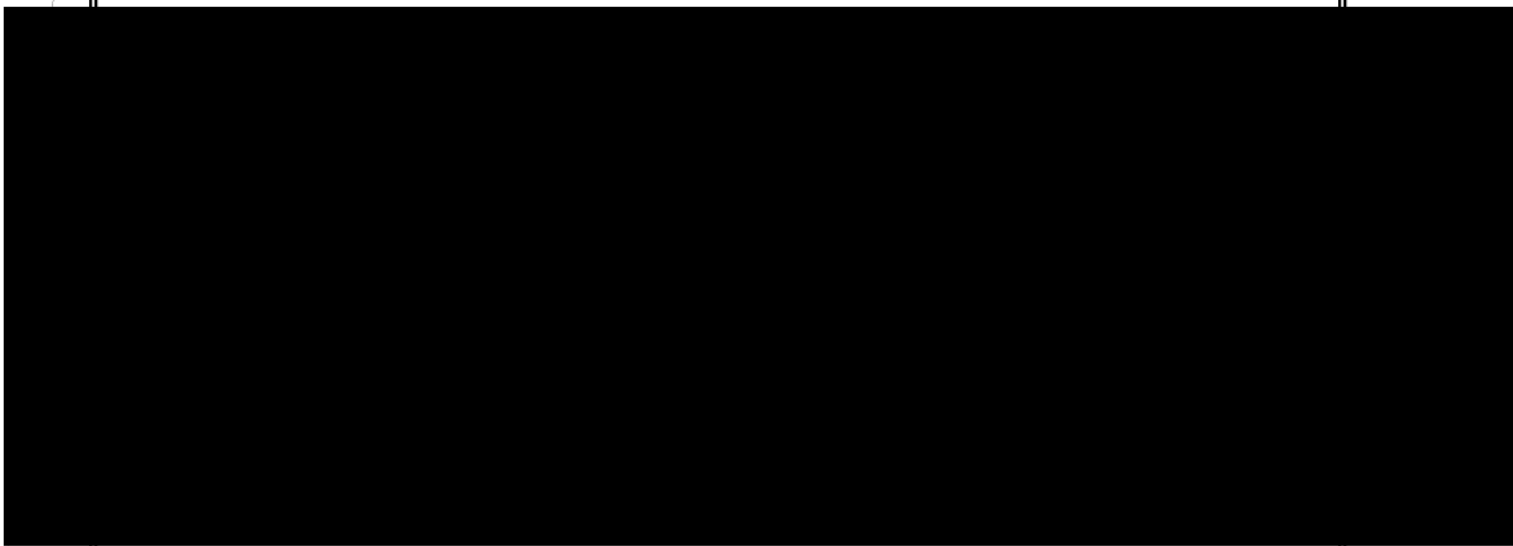


Non-Canvassing Certificate

To: Shropshire Council (hereinafter called “the Council”)

I/We hereby certify that I/We have not canvassed or solicited any member officer or employee of the Council in connection with the award of this Tender or any other Tender or proposed Tender for the Services and that no person employed by me/us or acting on my/our behalf has done any such act.

I/We further hereby undertake that I/We will not in the future canvass or solicit any member officer or employee of the Council in connection with the award of this Tender or any other Tender or proposed Tender for the Services and that no person employed by me/us or acting on my/our behalf will do any such act.



A large, empty rectangular box with a double-line border, likely intended for a signature or stamp.



A3 Non-collusive Tendering Certificate

Non-collusive Tendering Certificate

To: Shropshire Council (hereinafter called “the Council”)

The essence of selective tendering is that the Council shall receive bona fide competitive Tenders from all persons tendering. In recognition of this principle:

I/We certify that this is a bona fide Tender, intended to be competitive and that I/We have not fixed or adjusted the amount of the Tender or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

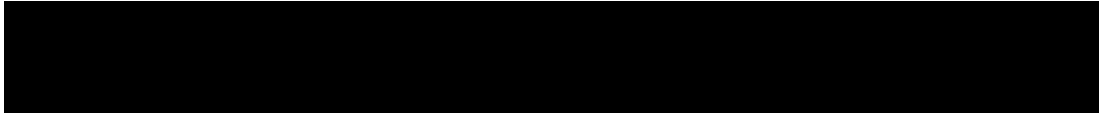
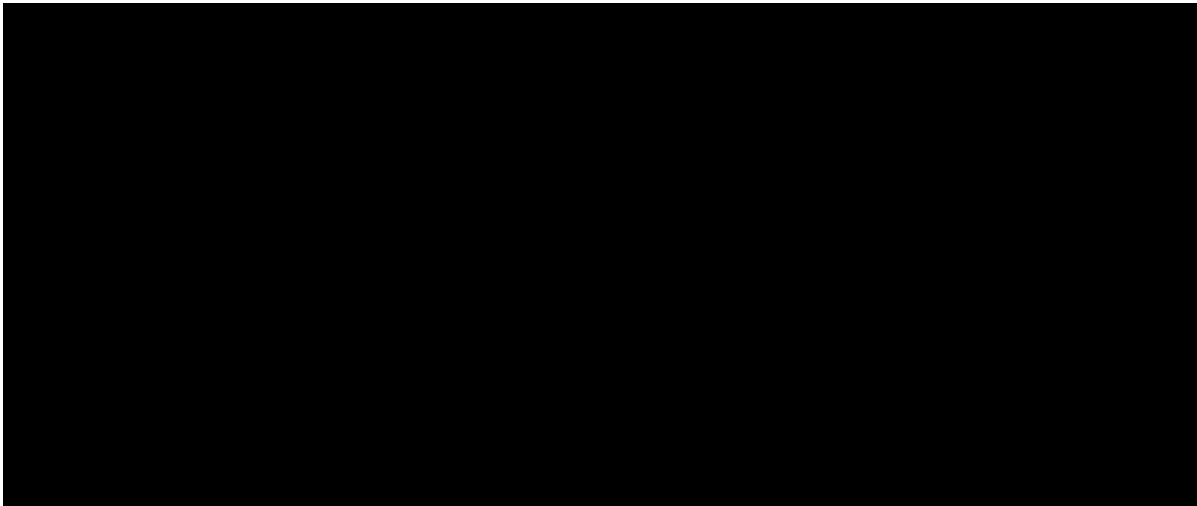
I/We also certify that I/We have not done and undertake that I/We will not do at any time any of the following acts:-

- (a) communicating to a person other than the Council the amount or approximate amount of my/our proposed Tender (other than in confidence in order to obtain quotations necessary for the preparation of the Tender for insurance); or
- (b) entering into any agreement or arrangement with any other person that he shall refrain from Tendering or as to the amount of any Tender to be submitted; or
- (c) offering or agreeing to pay or give or paying any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Tender or proposed Tender for the Services any act or omission.

Section A:

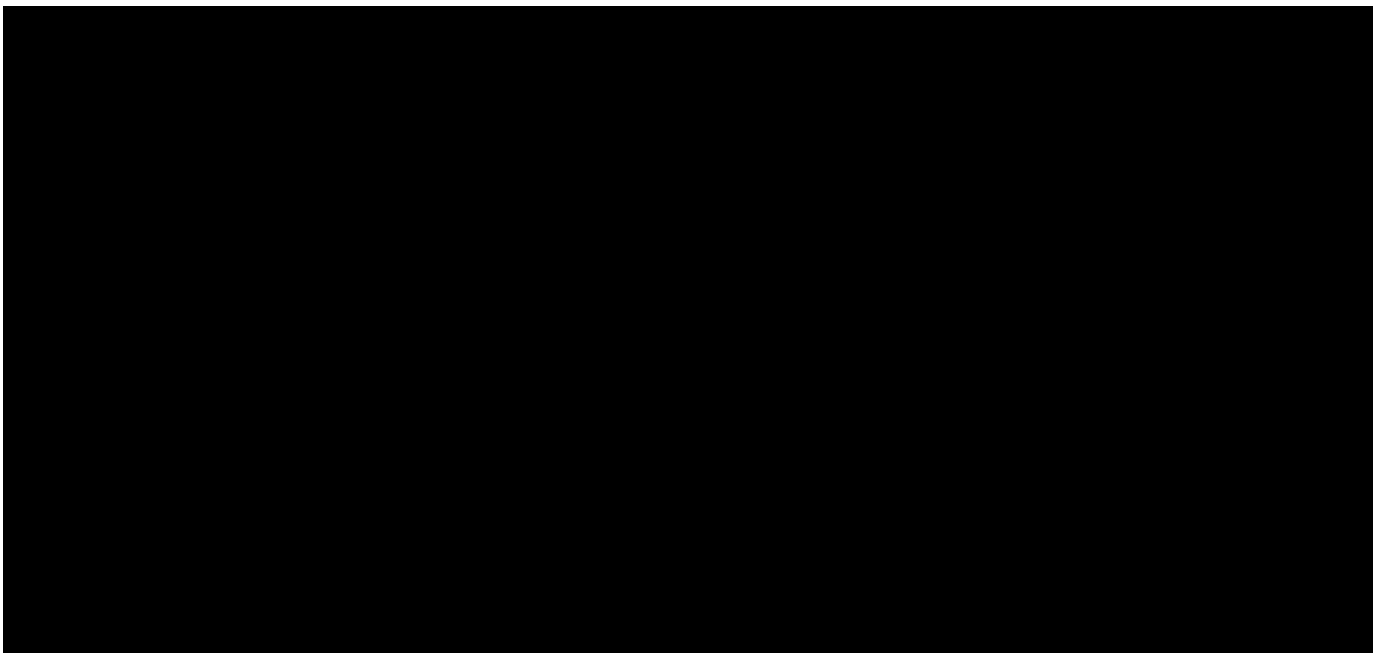
4. Declaration of Connection with Officers or Elected Members of the Council

Are you or any of your staff who will be affected by this invitation to tender related or connected in any way with any Shropshire Council Elected Councillor or Employee?

A solid black rectangular box used to redact information.A large solid black rectangular box used to redact a significant portion of the document.

Please note:

This information is collected to enable the Council to ensure that tenders are assessed without favouritism. Whether or not you have a connection with elected members or employees will have no bearing on the success of your tender, but your tender will not be considered unless this declaration has been completed.

A large solid black rectangular box used to redact the main body of the document.A thin solid black horizontal line used to redact a single line of text.A solid black rectangular box used to redact information at the bottom of the page.

SECTION B

Standard Selection Questionnaire

Potential Supplier Information and Exclusion Grounds: Part 1 and Part 2.

The standard Selection Questionnaire is a self-declaration, made by you (the potential supplier), that you do not meet any of the grounds for exclusion. If there are grounds for exclusion (there is an opportunity to explain the background and any measures you have taken to rectify the situation (we call this self-cleaning). For the list of exclusion please see

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_and_Discretionary_Exclusions.pdf

A completed declaration of Part 1 and Part 2 provides a formal statement that the organisation making the declaration has not breached any of the exclusions grounds. Consequently we require all the organisations that you will rely on to meet the selection criteria to provide a completed Part 1 and Part 2. For example these could be parent companies, affiliates, associates, or essential sub-contractors, if they are relied upon to meet the selection criteria. This means that where you are joining in a group of organisations, including joint ventures and partnerships, each organisation in that group must complete one of these self-declarations. Sub-contractors that you rely on to meet the selection criteria must also complete a self-declaration (although sub-contractors that are not relied upon do not need to complete the self-declaration).

When completed, this form is to be sent back to the contact point given in the procurement documents along with the selection information requested in the procurement documentation.

Supplier Selection Questions: Part 3

This document provides instructions on the selection questions you need to respond to and how to submit those responses. If you are bidding on behalf of a group (consortium) or you intend to use sub-contractors, you should complete all of the selection questions on behalf of the consortium and/or any sub-contractors.

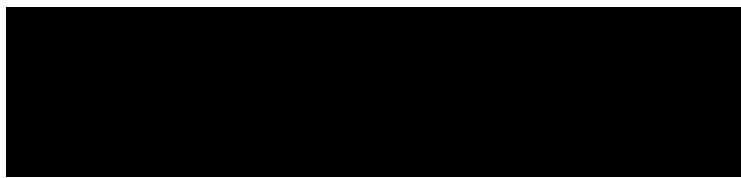
If the relevant documentary evidence referred to in the Selection Questionnaire is not provided upon request and without delay we reserve the right to amend the contract award decision and award to the next compliant bidder.

Consequences of misrepresentation

If you seriously misrepresent any factual information in filling in the Selection 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 three years. 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, and you must be excluded from further procurements for five years.

Notes for completion

1. The “authority” means the contracting authority, or anyone acting on behalf of the contracting authority, that is seeking to invite suitable candidates to participate in this procurement process.



2. "You" / "Your" refers to the potential supplier completing this standard Selection Questionnaire i.e. the legal entity responsible for the information provided. The term "potential supplier" is intended to cover any economic operator as defined by the Public Contracts Regulations 2015 (referred to as the "regulations") and could be a registered company; the lead contact for a group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state 'N/A'. Should you need to provide additional information in response to the questions, please submit a clearly identified annex.
4. The authority recognises that arrangements set out in section 1.2 of the standard Selection Questionnaire, in relation to a group of economic operators (for example, a consortium) and/or use of sub-contractors, may be subject to change and will, therefore, not be finalised until a later date. The lead contact should notify the authority immediately of any change in the proposed arrangements and ensure a completed Part 1 and Part 2 is submitted for any new organisation relied on to meet the selection criteria. The authority will make a revised assessment of the submission based on the updated information.
5. For Part 1 and Part 2 every organisation that is being relied on to meet the selection must complete and submit the self-declaration.
6. For answers to Part 3 - If you are bidding on behalf of a group, for example, a consortium, or you intend to use sub-contractors, you should complete all of the questions on behalf of the consortium and/ or any sub-contractors, providing one composite response and declaration.

The authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the regulations, or pursuant to an order of the court or demand made by any competent authority or body where the authority is under a legal or regulatory obligation to make such a disclosure.

Part 1: Potential supplier Information

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

Section 1	Potential supplier information	
Question number	Question	Response
1.1(a)	Full name of the potential supplier submitting the information	
1.1(b) – (i)	Registered office address (if applicable)	
1.1(b) – (ii)	Registered website address (if applicable)	
1.1(c)	Trading status a) public limited company b) limited company	



	c) limited liability partnership d) other partnership e) sole trader f) third sector g) other (please specify your trading status)	
1.1(d)	Date of registration in country of origin	
1.1(e)	Company registration number (if applicable)	
1.1(f)	Charity registration number (if applicable)	
1.1(g)	Head office DUNS number (if applicable)	
1.1(h)	Registered VAT number	
1.1(i) - (i)	If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established?	
1.1(i) - (ii)	If you responded yes to 1.1(i) - (i), please provide the relevant details, including the registration number(s).	
1.1(j) - (i)	Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement?	
1.1(j) - (ii)	If you responded yes to 1.1(j) - (i), please provide additional details of what is required and confirmation that you have complied with this.	
1.1(k)	Trading name(s) that will be used if successful in this procurement.	
1.1(l)	Relevant classifications (state whether you fall within one of these, and if so which one) a) Voluntary Community Social Enterprise (VCSE) b) Sheltered Workshop c) Public Service Mutual	
1.1(m)	Are you a Small, Medium or Micro Enterprise (SME)?	
1.1(n)	Details of Persons of Significant Control (PSC), where appropriate: 3 - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used);	



	<ul style="list-style-type: none"> - Which conditions for being a PSC are met; - Over 25% up to (and including) 50%, - More than 50% and less than 75%, - 75% or more. (Please enter N/A if not applicable)	
1.1(o)	Details of immediate parent company: <ul style="list-style-type: none"> - Full name of the immediate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) (Please enter N/A if not applicable)	
1.1(p)	Details of ultimate parent company: <ul style="list-style-type: none"> - Full name of the ultimate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) (Please enter N/A if not applicable)	

Please note: A criminal record check for relevant convictions may be undertaken for the preferred suppliers and the persons of significant in control of them.

2 See EU definition of SME - https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en

3 UK companies, Societates European (SEs) and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. See PSC guidance.

Please provide the following information about your approach to this procurement:

Section 1	Bidding Model	
Question number	Question	Response
1.2(a) - (i)	Are you bidding as the lead contact for a group of economic operators?	
1.2(a) - (ii)	Name of group of economic operators (if applicable)	
1.2(a) - (iii)	Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure.	



1.2(b) - (i)	Are you or, if applicable, the group of economic operators proposing to use sub-contractors?		
1.2(b) - (ii)	If you responded yes to 1.2(b)-(i) please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well.		
	<div></div>		

Contact details and declaration

I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.

I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.

I understand that the information will be used in the selection process to assess my organisation's suitability to be invited to participate further in this procurement.

I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.

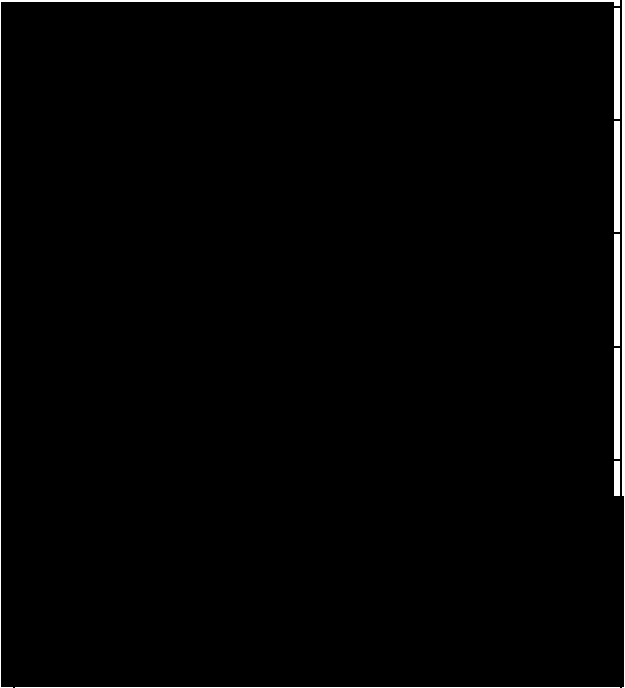
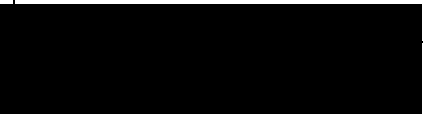
I am aware of the consequences of serious misrepresentation.

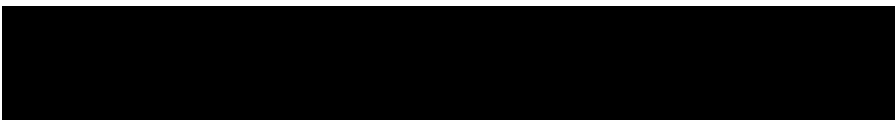
Section 1	Contact details and declaration	
Question Number	Question	Response
1.3(a)	Contact name	
1.3(b)	Name of organisation	
1.3(c)	Role in organisation	
1.3(d)	Phone number	
1.3(e)	E-mail address	
1.3(f)	Postal address	
1.3(g)	Signature (electronic is acceptable)	
1.3(h)	Date	



Part 2: Exclusion Grounds

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

Section 2	Grounds for mandatory exclusion	
Question number	Question	Response
2.1(a)	<p>Regulations 57(1) and (2) The detailed grounds for mandatory exclusion of an organisation are set out on the webpage (see link on page 11), which should be referred to before completing these questions. Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed on the webpage.</p>	
	Participation in a criminal organisation.	
	Corruption.	
	Fraud.	
	Terrorist offences or offences linked to terrorist activities	
	Money laundering or terrorist financing	
	Child labour and other forms of trafficking in human beings	
2.1(b)	<p>If you have answered yes to question 2.1(a), please provide further details. Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction, Identity of who has been convicted If the relevant documentation is available electronically please provide the web address, issuing authority, precise reference of the documents.</p>	
2.2	If you have answered Yes to any of the points above have measures been taken to	



	demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning)
2.3(a)	Regulation 57(3) Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions?
2.3(b)	If you have answered yes to question 2.3(a), please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.
2.4	Please confirm that you have in place, or that you will have in place by contract award, the human and technical resources to perform the contract to ensure compliance with the General Data Protection Regulation and to ensure the protection of the rights of data subjects
2.4(a)	Please provide details of the technical facilities and measures (including systems and processes) you have in place, or will have in place by contract award, to ensure compliance with the General Data Protection Regulation and to ensure the protection of the rights of data subjects. Your response should include, but should not be limited to facilities and measures: <ul style="list-style-type: none"> ○ to ensure ongoing confidentiality, integrity, availability and resilience of processing systems and services; ○ to comply with the rights of data subjects in respect of receiving privacy information, and access, rectification, deletion and portability of personal data; ○ to ensure that any consent based processing meets standards of active, informed consent, and that such consents are recorded and auditable; ○ to ensure legal safeguards are in place to legitimise transfers of personal data outside the EU (if such transfers will take place);

	<ul style="list-style-type: none"> ○ to maintain records of personal data processing activities; and ○ to regularly test, assess and evaluate the effectiveness of the above measures. 	
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Please Note: The authority reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions.

Section 3	Grounds for discretionary exclusion	
Question number	Question	Response
	<p>Regulation 57 (8) The detailed grounds for discretionary exclusion of an organisation are set out on this webpage (see link on page 11), which should be referred to before completing these questions.</p> <p>Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation.</p>	
3.1(a)	Breach of environmental obligations?	



3.1(b)	Breach of social obligations?	
3.1(c)	Breach of labour law obligations?	
3.1(d)	Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation's assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State?	
3.1(e)	Guilty of grave professional misconduct?	
3.1(f)	Entered into agreements with other economic operators aimed at distorting competition?	
3.1(g)	Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure?	
3.1(h)	Been involved in the preparation of the procurement procedure?	
3.1(i)	Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions?	

3.1(j)	Please answer the following statements	
3.1(j) - (i)	The organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria.	
3.1(j) - (ii)	The organisation has withheld such information.	
3.1(j) –(iii)		



3.1(j)-(iv)	<p>The organisation is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015.</p> <p>The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the procurement procedure, or to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award.</p>	
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3.2	If you have answered Yes to any of the above, explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant	
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Section 4	Economic and Financial Standing	
Question number	Question	Response
4.1	Are you able to provide a copy of your audited accounts for the last two years, if requested? If no, can you provide one of the following: answer with Y/N in the relevant box.	
	(a) A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation.	
	(b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.	
	(c) Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).	
4.2	Where we have specified a minimum level of economic and financial standing and/ or a minimum financial threshold within the evaluation criteria for this procurement, please self-certify by answering 'Yes' or 'No' that you meet the requirements set out.	

Section 5	If you have indicated in the Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below:	
Name of organisation		

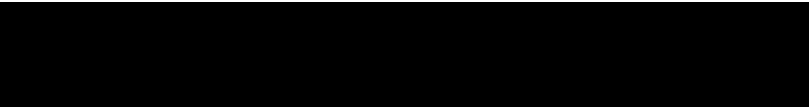
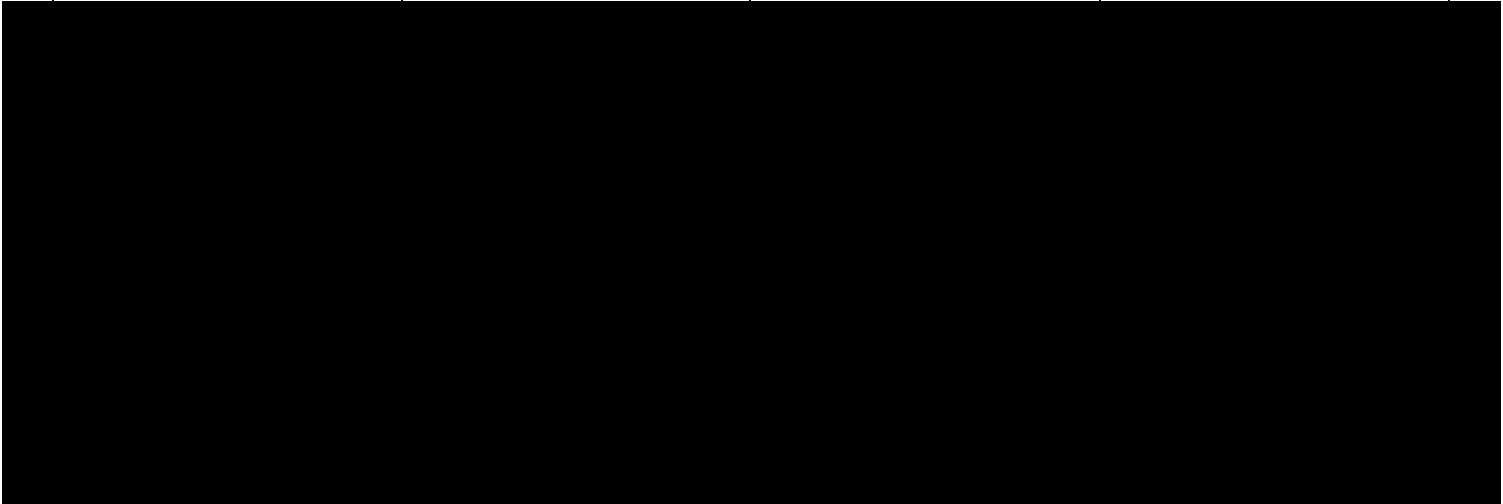


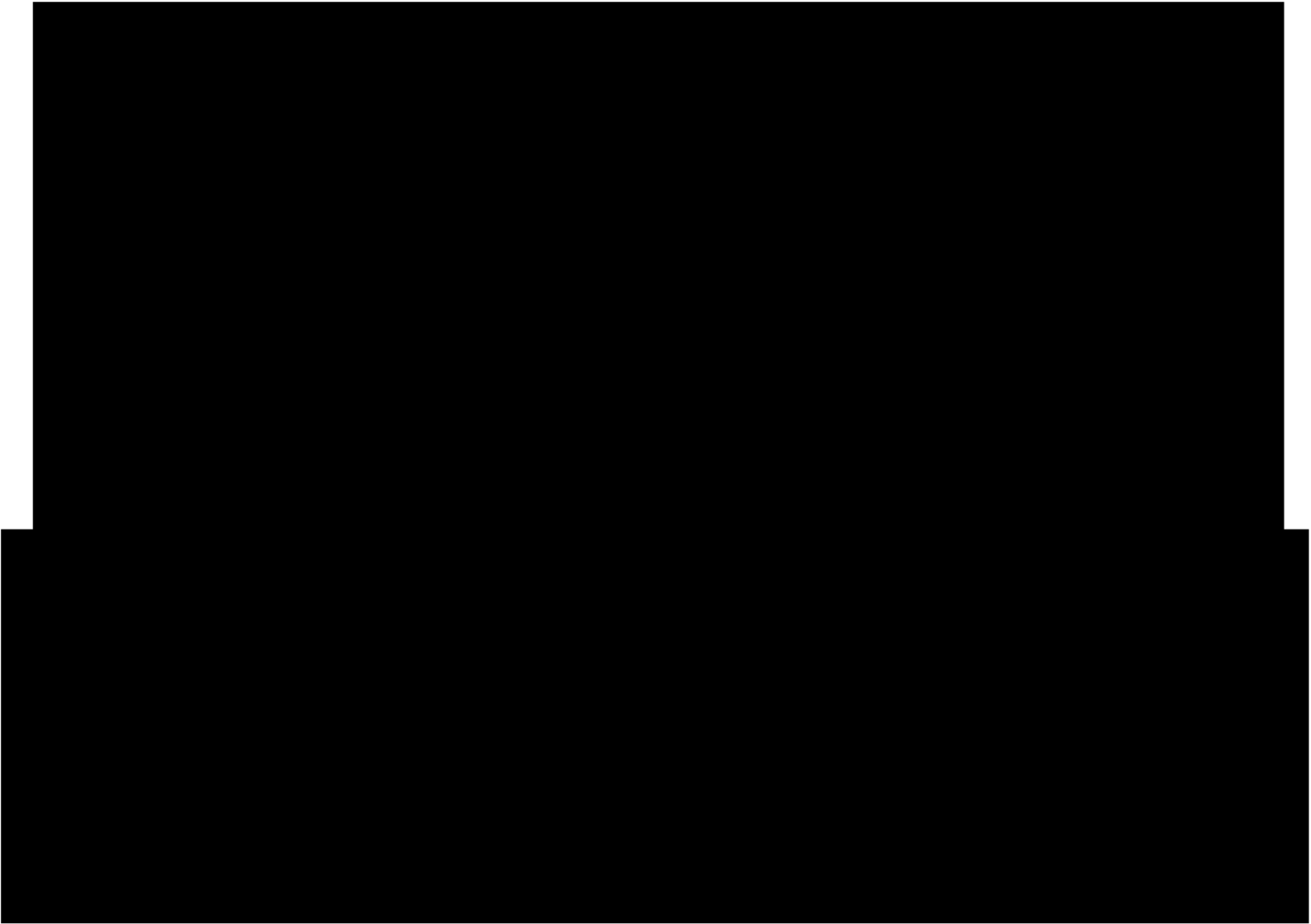
Relationship to the Supplier completing these questions	Parent Company
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5.1	Are you able to provide parent company accounts if requested to at a later stage?	
5.2	If yes, would the parent company be willing to provide a guarantee if necessary?	
5.3	If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)?	

Section 6	Technical and Professional Ability
6.1	<p>Relevant experience and contract examples</p> <p>Please provide details of up to three contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. VCSEs may include samples of grant-funded work. Contracts for supplies or services should have been performed during the past three years. Works contracts may be from the past five years.</p> <p>The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below.</p> <p>Consortia bids should provide relevant examples of where the consortium has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle is to be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).</p> <p>Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the main intended provider(s) or sub-contractor(s) who will deliver the contract.</p> <p>If you cannot provide examples see question 6.3</p>

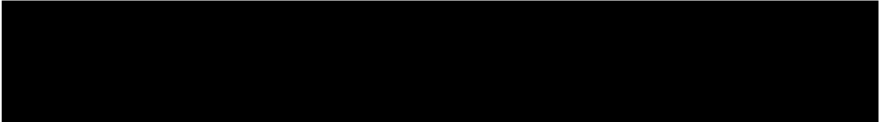
	Contact 1	Contact 2	Contact 3
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6.2	<p>Where you intend to sub-contract a proportion of the contract, please demonstrate how you have previously maintained healthy supply chains with your sub-contractor(s)</p> <p>Evidence should include, but is not limited to, details of your supply chain management tracking systems to ensure performance of the contract and including prompt payment or membership of the UK Prompt Payment Code (or equivalent schemes in other countries)</p>
	

6.3	<p>If you cannot provide at least one example for questions 6.1, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start-up or you have provided services in the past but not under a contract.</p>
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Section 7	Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015	
	Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")?	
	If you have answered yes to question 7.1 are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015?	

8.Additional Questions

Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this if they are successful at contract award stage.

Section 8	Additional Questions	
8.1	Insurance	
	Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below:	
	<p>Employer's (Compulsory) Liability Insurance = £5M</p> <p>Public Liability Insurance = £5M</p> <p>Professional Indemnity Insurance = £5M</p> <p>*It is a legal requirement that all companies hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders.</p>	

8.2	Skills and Apprentices 4 –	
a.	Public procurement of contracts with a full life value of £10 million and above and duration of 12 months and above should be used to support skills development and delivery of the apprenticeship commitment. This policy is set out in detail in Procurement Policy Note 14/15.	



	Please confirm if you will be supporting apprenticeships and skills development through this contract.
b.	If yes, can you provide at a later stage documentary evidence to support your commitment to developing and investing in skills, development and apprenticeships to build a more skilled and productive workforce and reducing the risks of supply constraints and increasing labour cost inflation?
c.	Do you have a process in place to ensure that your supply chain supports skills, development and apprenticeships in line with PPN 14/15 (see guidance) and can provide evidence if requested?

4 Procurement Policy Note 14/15– Supporting Apprenticeships and Skills Through Public Procurement
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/456805/27_08_15_Skills_Apprenticeships_PPN_vfinal.pdf

8.3 – Compliance with equality legislation

For organisations working outside of the UK please refer to equivalent legislation in the country that you are located.	
1.	In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)?
2.	<p>In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds or alleged unlawful discrimination?</p> <p>If you have answered “yes” to one or both of the questions in this module, please provide, as a separate Appendix, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.</p> <p>If the investigation upheld the complaint against your organisation, please use the Appendix to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.</p> <p>You may be excluded if you are unable to demonstrate to the Authority’s satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.</p>
3.	If you use sub-contractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations?

8.4 – Environmental Management

1.	Has your organisation been convicted of breaching environmental legislation, or had any notice served upon it, in the last three years by any environmental regulator or authority (including local authority)?
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	<p>If your answer to the this question is “Yes”, please provide details in a separate Appendix of the conviction or notice and details of any remedial action or changes you have made as a result of conviction or notices served.</p> <p>The Authority will not select bidder(s) that have been prosecuted or served notice under environmental legislation in the last 3 years, unless the Authority is satisfied that appropriate remedial action has been taken to prevent future occurrences/breaches.</p>	
2.	If you use sub-contractors, do you have processes in place to check whether any of these organisations have been convicted or had a notice served upon them for infringement of environmental legislation?	

8.5 – Health & Safety

1.	Please self-certify that your organisation has a Health and Safety Policy that complies with current legislative requirements.	
2.	<p>Has your organisation or any of its Directors or Executive Officers been in receipt of enforcement/remedial orders in relation to the Health and Safety Executive (or equivalent body) in the last 3 years?</p> <p>If your answer to this question was “Yes”, please provide details in a separate Appendix of any enforcement/remedial orders served and give details of any remedial action or changes to procedures you have made as a result.</p> <p>The Authority will exclude bidder(s) that have been in receipt of enforcement/remedial action orders unless the bidder(s) can demonstrate to the Authority’s satisfaction that appropriate remedial action has been taken to prevent future occurrences or breaches.</p>	
3.	If you use sub-contractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations?	

8.6 Climate Impact / Carbon Reduction Plans

The Council has declared a climate emergency and is committed to achieving ‘net-zero’ carbon impact by 2030. Procured goods, works and services make up a significant proportion of the Council’s total carbon footprint. It is therefore important that all contractors take steps to understand the carbon impact of the goods, works or services they provide and are able to set out how they will work with the Council to help us achieve ‘net-zero’.

1.	<p>Please certify if your organisation has a Carbon Reduction / Climate Impact / Environmental Policy or Plan that aims to reduce your carbon footprint over the term of this contract.</p> <p>If your answer to this question was “Yes” and you are successful in this tender, we may ask you to submit a copy of your policy or plan.</p>	
2.	Does your organisation use a recognised tool to generate Climate Impact Statements and report the climate impact of your operations?	

	If your answer to this question was “Yes” and you are successful in this tender, we may ask you to submit details of the reporting tool you use and any outputs from it.	
3.	<p>Is your organisation certified or accredited under any recognised framework (eg Carbon Trust or Planet Mark or equivalent)?</p> <p>If your answer to this question was “Yes” and you are successful in this tender, we may ask you to submit a copy of your latest certification / accreditation.</p> <p>If your answer to this question was “No” please say whether you plan to achieve certification / accreditation under a recognised framework in future.</p>	
4.	If you use sub-contractors, do you have processes in place to check whether any of the above apply to these other organisations?	

8.7 Safeguarding of adults and children

1	Do you have a Safeguarding Policy or statement for safeguarding children? Do you have a Safeguarding Policy or statement for safeguarding adults?	
2	For information: our requests for references will include a question relating to you organisation’s record for safeguarding.	
3	<p>As a contractor providing a public service on behalf of a Shropshire Council, we expect that you will be familiar and committed to the local safeguarding procedures as prescribed by Shropshire’s Safeguarding Children Board (SSCB) and http://www.safeguardingshropshireschildren.org.uk/scb/index.html Shropshire Council’s approach to adult protection http://www.shropshire.gov.uk/adultcarer.nsf/open/F54E8A80CF1343BC80257AAF0058F760</p> <p>I/We certify that I/We are familiar with and committed to deliver our service in</p>	

Notes to this form:

Text highlighted in yellow is where details need to be inserted

Text highlighted in green are optional clauses which require consideration as to whether or not they should be retained.

DATED: day of 2022

BETWEEN

SHROPSHIRE COUNCIL (1)

[.....] (2)¹

Contract Ref: RMCB 040

Contract for the Maintenance and Repair of Assisted Living Equipment



LEGAL AND DEMOCRATIC SERVICES
The Shirehall Abbey Foregate Shrewsbury SY2 6ND
DX 702024 Shrewsbury 2

¹ Insert Contractor's name

1. Definitions

1.1 In this Agreement, the following words shall have the following meanings:

Agreed Prices	means the rates referred to in the Pricing Schedule of Section C of the Tender. The Agreed Prices shall remain firm for the Initial Term. Where the Council exercises its Option to Extend this Agreement, the Agreed Prices for the Extension Period(s) shall be as agreed in advance and in writing between the parties prior to the commencement of an agreed Extension Period
‘Agreement’	means this Agreement
‘Annual Review’	means the annual review to be held on the anniversary of the term or on such date as shall be agreed between the Parties to review the progress of the operation of the Services, accounts and any other operational issues that may arise
‘Assisted Living Equipment’	<p>means lifts, ceiling track hoists, bath and stretchers complying with:</p> <ol style="list-style-type: none">1) BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures.2) BS 5965:1980 Specification for manually driven balanced personal home lifts.3) BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification.

	4) BS5776:1996 Specification for powered stairlifts
‘Associated Person’	means in respect of the Council, a person, partnership, limited liability partnership or company (and company shall include a company which is a subsidiary, a holding company or a company that is a subsidiary of the ultimate holding company of that company) in which the Council has a shareholding or other ownership interest; OR any other body that substantially performs any of the functions of the Council that previously had been performed by the Council. .
‘Authorised Officer’	means the representative appointed by the Council to manage the Contract on its behalf
‘Best Practice’	means in accordance with the best practice within the industry of the Contractor
Brexit	Means the withdrawal of the United Kingdom from the European Union with effect from 31 st January 2020
‘Bribery Act’	the Bribery Act 2010 and any subordinate legislation made under that Act from time to time together with any guidance or codes of practice issued by the relevant government department concerning the legislation.

‘Commencement Date’	1 st June 2022
‘Commercially Sensitive Information’	comprises the information of a commercially sensitive nature relating to the Contractor, its Intellectual Property Rights or its business which the Contractor has indicated to the Council in writing that, if disclosed by the Council, would cause the Contractor significant commercial disadvantage or material financial loss;
‘Confidential Information’	any information, however it is conveyed, that relates to the business, affairs, developments, trade secrets, know-how, personnel and suppliers of the Council or the Contractor, including Intellectual Property Rights, together with all information derived from the above, and any other information clearly designated as being confidential (whether or not it is marked as "confidential") or which ought reasonably to be considered to be confidential, including all Personal Data and the Commercially Sensitive Information;
‘Consumables’	means all items of equipment, materials or components that have to be replaced on a regular basis
‘Contract Documents’	means all of the documents annexed

	to, contained and referred to within this Agreement
'Contractor'	means the party named above and includes its employees, servants and agents paid or unpaid acting on its behalf
'Contractor Personnel'	all employees, agents, consultants and contractors of the Contractor and/or of any Sub-contractor paid or unpaid;
'Contractor's Representative'	the representative appointed by the Contractor to manage the contract on its behalf
'Council'	means the party named above and includes its employees, officers, servants and agents acting on its behalf
'Council Data'	<p>the data, text, drawings, diagrams, images or sounds (together with any database made up of any of these) which are embodied in any electronic, magnetic, optical or tangible media, and which are:</p> <p>(a) supplied to the Contractor by or on behalf of the Council; or</p> <p>which the Contractor is required to generate, process, store or transmit pursuant to this Agreement; or</p> <p>(b) any Personal Data for which the Council is the Data Controller;</p>

'Council Software'	software which is owned by or licensed to the Council, including software which is or will be used by the Contractor for the purposes of providing the Services but excluding the Contractor Software;
Covid 19	Means all forms and mutations of the viral infection (also known as Coronavirus) being the cause of a global pandemic prior to the Commencement Date and continuing during this Agreement
Data Controller	is as defined in the Data Protection Legislation
Data Loss Event	any event that results, or may result, in unauthorised access to Personal Data held by the Processor under this Agreement, and/or actual or potential loss and/or destruction of Personal Data in breach of this Agreement, including any Personal Data Breach
Data Protection Impact Assessment:	an assessment by the Data Controller of the impact of the envisaged processing on the protection of Personal Data.
'Data Processor'	is as defined in the Data Protection Legislation
'Data Protection Legislation'	all applicable data protection and privacy legislation in force from time to time in the UK including the retained EU law version of the

	General Data Protection Regulation ((EU) 2016/679) (UK GDPR); the Data Protection Act 2018 (DPA 2018) (and regulations made thereunder) and the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426) as amended and the guidance and codes of practice issued by the Information Commissioner or other relevant regulatory authority and applicable to a party
Data Protection Officer	Shall have the meaning given in the Data Protection Legislation
Data Subject	Shall have the same meaning defined in the Data Protection Legislation
Data Subject Request	a request made by, or on behalf of, a Data Subject in accordance with rights granted pursuant to the Data Protection Legislation to access their Personal Data.
Domestic Law	means the Law of the United Kingdom or a part of the United Kingdom
DPA 2018	Data Protection Act 2018
'EIR'	means the Environmental Information Regulations 2004 (as may be amended from time to time.)
'Employment Checks'	means the pre-appointment checks that are required by law and

	<p>applicable guidance, including without limitation, verification of identity checks, right to work checks, registration and qualification checks, employment history and reference checks and disclosure and barring checks</p>
‘Exempt Information’	<p>means any information or class of information (including but not limited to any document, report, Agreement or other material containing information) relating to this Agreement or otherwise relating to the parties to this Agreement which potentially falls within an exemption to FOIA (as set out therein)</p>
“Expiry Date”	<p>Shall be the later of either:</p> <ul style="list-style-type: none"> i) the Initial Expiry Date; or ii) the last day of any agreed extension period further to clause 2 below; <p>or such other date as this Agreement is terminated in accordance with its terms</p>
‘Extension Period’	<p>Means any extension to the duration of this Agreement as agreed between the parties further to the clause 2 of this Agreement</p>
‘Fees’	<p>shall be the Agreed Prices and shall include all expenses, materials (including Consumables), labour, plant, equipment, handling of</p>

	materials and plant, tools and appliances, travel time and mileage to and from Properties and all other things necessary for the supply of the required services unless where specifically stated otherwise
'FOIA'	means the Freedom of Information Act 2000 and all subsequent regulations made under this or any superseding or amending enactment and regulations; any words and expressions defined in the FOIA shall have the same meaning in this Agreement
'FOIA notice'	means a decision notice, enforcement notice and/or an information notice issued by the Information Commissioner.
Force Majeure Event	means any circumstance not within a party's reasonable control including, without limitation: <ul style="list-style-type: none"> a) acts of God, flood, drought, earthquake or other natural disaster; b) epidemic or pandemic; c) terrorist attack, civil war, civil commotion or riots, war, threat of or preparation for war, armed conflict, imposition of sanctions, embargo, or breaking off of diplomatic

relations;

- d) nuclear, chemical or biological contamination or sonic boom;
- e) any law or any action taken by a government or public authority, including without limitation imposing an export or import restriction, quota or prohibition, or failing to grant a necessary licence or consent;
- f) collapse of buildings, fire, explosion or accident; and
- g) any labour or trade dispute, strikes, industrial action or lockouts (other than in each case by the party seeking to rely on clause 35, or companies in the same group as that party);
- h) non-performance by suppliers or subcontractors (other than by companies in the same group as the party seeking to rely on this clause 35 (Force Majeure); and
- i) interruption or failure of utility service.

provided always that COVID-19 and Brexit and their impacts including associated Government

	acts and regulations shall be treated as foreseeable by and within the control of the Parties
GDPR	Means the General Data Protection Regulation 2016/679 as they apply and are incorporated into UK law by UKGDPR
'Initial Term'	means a period of three years commencing on the Commencement Date and expiring on the Initial Expiry Date
'Initial Expiry Date'	means 31 st March 2025
'Intellectual Property Rights'	means all patents, registered and unregistered designs, copyright, trade marks, know-how and all other forms of intellectual property wherever in the world enforceable
Law	means any law, subordinate legislation within the meaning of Section 21(1) of the Interpretation Act 1978, bye-law, regulation, order, regulatory policy, mandatory guidance or code of practice, judgment of a relevant court of law, or directives or requirements with which the Contractor is bound to comply;
'Malicious Software'	any software program or code intended to destroy, interfere with, corrupt, or cause undesired effects on program files, data or other

	information, executable code or application software macros, whether or not its operation is immediate or delayed, and whether the malicious software is introduced wilfully, negligently or without knowledge of its existence;
‘Option to Extend’	means the Council’s option to extend the Initial Term by a period of up to two years commencing from and including 1 st April 2025 being the date following the Initial Expiry Date
‘Order’	means an official order placed by the Council to the Contractor for the supply of Services in accordance with the terms of this Agreement
Order Number	Means an order reference given by the Council to the Contractor which must be quoted on all Valid Invoices submitted for payment
‘Outcomes’	means the key performance indicators targets, results or objectives specified in section 5 of the Specification
‘Parties’	the Contractor and the Council and ‘Party’ shall mean either one of them
‘Personal Data’	shall have the same meaning as set out in the Data Protection Legislation
‘Personal Data Breach’	means anything which constitutes a "personal data breach" as set defined in the Data Protection Legislation

Processor Personnel:	means all directors, officers, employees, agents, consultants and contractors of the Data Processor and/or of any Sub-Processor engaged in the performance of its obligations under this Agreement
'Prohibited Act'	<p>the following constitute Prohibited Acts:</p> <p>(a) to directly or indirectly offer, promise or give any person working for or engaged by the Council a financial or other advantage to:</p> <p style="padding-left: 40px;">(i) induce that person to perform improperly a relevant function or activity; or</p> <p style="padding-left: 40px;">(ii) reward that person for improper performance of a relevant function or activity;</p> <p>(b) to directly or indirectly request, agree to receive or accept any financial or other advantage as an inducement or a reward for improper performance of a relevant function or activity in connection with this Agreement;</p> <p>(c) committing any offence:</p> <p style="padding-left: 40px;">(i) under the Bribery Act;</p> <p style="padding-left: 40px;">(ii) under legislation creating offences concerning fraudulent acts;</p>

	(iii) at common law concerning fraudulent acts relating to this Agreement or any other contract with the Council; or
	(d) defrauding, attempting to defraud or conspiring to defraud the Council.
'Project Materials'	means all reports, the Specification, documents, papers, information, data, disks, drawings, samples, patterns, in whatever form, medium or format and wherever such Project Materials are located or stored together with all copies of Project Materials
'Property/Properties'	means the sites where the Services will be delivered/carried out as listed in Schedule 3 of this Agreement
'PSG'	Is the Property Services Group being the Council's service area responsible for maintenance of its properties and buildings as defined in the FOIA 2000
'Public body'	
'RAG System'	Means the traffic light contract performance monitoring system used by the Council as more specifically referred to in clause 28 and the Specification
'Receiving Party'	means a party to this Agreement to whom a Request for Information is made under FOIA, and who thereafter has overall conduct of the request and any response
'Regulatory Bodies'	those government departments and

regulatory, statutory and other entities, committees and bodies which, whether under statute, rules, regulations, codes of practice or otherwise, are entitled to regulate, investigate, or influence the matters dealt with in this Agreement or any other affairs of the Council and "Regulatory Body" shall be construed accordingly;

‘Relevant Transfer’

means a relevant transfer for the purposes of TUPE

‘Request for Information’

means a written request for information pursuant to the FOIA as defined by Section 8 of the FOIA

‘Review’

means a formal review of the progress of the Services

‘Services ’

means the repair and maintenance of Assisted Living Equipment as more specifically referred to in the Specification

‘Specification’

The specific description of the Services as set out in Schedule 1 annexed to this Agreement

‘Sub-Contract’

any contract or agreement, or proposed contract or agreement between the Contractor and any third party whereby that third party agrees to provide to the Contractor the Services or any part thereof, or facilities or services necessary for the

	provision of the Services or any part of the Services, or necessary for the management, direction or control of the Services or any part of thereof.
'Sub-Contractor'	the third parties that enter into a Sub-Contract with the Contractor.
Sub-processor	any third party appointed to process Personal Data on behalf of the Contractor related to this Agreement.
'Tender'	means the tender dated [.....] ⁶ submitted by the Contractor and accepted by the Council annexed to this Agreement in Appendix 1
'Term'	means the period commencing on the Commencement Date and expiring on the Expiry Date
'TUPE'	means the Transfer of Undertakings (Protection of Employment) Regulations 2006
'Valid Invoice'	Means an invoice submitted by the Contractor which must contain the following detail required by the Council to enable payment as specified in clause 9 of this Agreement: 1) invoices to be addressed to PSG, Shropshire Council at the address referred to above; and

⁶ Where the tender is being annexed to this Agreement, please insert date of tender

2) submitted on the Contractor's business letterhead including the Contractor's name and address, and VAT registration number (where applicable); and

3) Site name, property number and address to which payment relates; and

4) the Council's official Order Number together with the additional information required by clause 9.2 of this Agreement as applicable

'Working Day'

any day other than a Saturday, Sunday or public holiday in England and Wales.

1.2 Interpretation

In this Agreement unless the context otherwise requires:

1.2.1 words importing any gender include every gender

1.2.2 words importing the singular number include the plural number and vice versa

1.2.3 A person includes an individual, firm, company, corporation, unincorporated body of persons, or any state or any agency of any person.

1.2.4 A reference to a company shall include any company, corporation or other body corporate, wherever and however incorporated or established.

1.2.5 A reference to a holding company or subsidiary means a holding company or subsidiary as defined in section 1159 of the Companies Act 2006.

In the case of a limited liability partnership which is a subsidiary of a company or another limited liability partnership, section 1159 of the Companies Act 2006 shall be amended so that:

(i) references in sub-sections 1159(1)(a) and (c) to voting rights are to the members' rights to vote on all or substantially all matters which are decided by a vote of the members of the limited liability partnership; and
(ii) the reference in sub-section 1159(1)(b) to the right to appoint or remove a majority of its board of directors is to the right to appoint or remove members holding a majority of the voting rights.

- 1.2.6 references to numbered clauses and schedules are references to the relevant clause in or schedule to this Agreement
- 1.2.7 reference in any schedule to this Agreement to numbered paragraphs relate to the numbered paragraphs of that schedule
- 1.2.8 any obligation on any Party not to do or omit to do anything is to include an obligation not to allow that thing to be done or omitted to be done
- 1.2.9 the headings to the clauses, schedules and paragraphs of this Agreement are not to affect the interpretation
- 1.2.10 A reference to a statute or statutory provision is a reference to it as it is in force for the time being, taking account of any amendment, extension, or re-enactment and includes any subordinate legislation for the time being in force made under it.
- 1.2.11 where the word 'including' is used in this Agreement, it shall be understood as meaning 'including without limitation'
- 1.2.10 Where any statement is qualified by the expression so far as the Contractor is aware or to the Contractor's knowledge or any similar expression, that statement shall be deemed to include an additional statement that it has been made after due and careful enquiry.
- 1.2.12 A reference to writing or written does not include e-mail, unless otherwise specifically agreed.

2. Term:

- 2.1** It is agreed between the Parties that this Agreement will be for the Initial Term commencing on the Commencement Date and ending on the Initial Expiry Date.
- 2.2** It is further agreed between the Parties that the Council may exercise its Option to Extend this Agreement at the expiry of the Initial Term for further periods of twelve months up to a maximum of two extensions

from the 1st April 2025 (Extension Period(s). For the avoidance of doubt, the total duration of this Agreement permitted by its terms shall be five years from the Commencement Date and shall not continue beyond 31st March 2027.

2.3 If the Council decides to exercise its Option to Extend the Initial Term it shall notify the Contractor in writing at least 1 month in advance of the expiry date of the Initial Term. Where the Parties agree an Extension Period to the Initial Term the provisions of this Agreement between the Council and the Contractor shall be the terms to be applied to the Extension Period, SAVE FOR any agreed variations to such terms and/or to the Fees which shall be formalised in writing by way of Deed of Variation and signed by the Parties in advance of the commencement of any agreed Extension Period.

2.4 If the Council decides that it does not wish to exercise its Option to Extend then this Agreement shall terminate on the Initial Expiry Date and the provisions of clause 39 (Consequences of Termination) shall apply

3. Standing Arrangement

3.1 The Parties agree that there are no maximum or minimum limits to the Orders that may be placed by the Council to the Contractor

3.2 The Parties agree that the Council shall not give any guarantee as to the likely values to be seen under the terms of this Agreement

4. Services

4.1 The Contractor shall provide the Services to the Council in consideration for the Council paying the Fee(s) to the Contractor, subject to the provisions of this Agreement

4.2 The Contractor shall provide the Services (subject to local or central government Covid-19 restrictions or guidance in place at the applicable time) in such places and locations as set out in Schedule 3 (or as agreed by the Parties from time to time)

4.3 The Contractor shall use its best endeavours to complete/deliver the Services by the dates specified in the servicing schedule set out in Schedule 2 to this Agreement or on dates otherwise agreed in writing between the Parties

- 4.4** Issue of Orders:
- 4.4.1** During the Term the Council/Properties may from time to time instruct the Contractor to carry out the Services in accordance with the Specification by issuing an Order to the Contractor in writing.
 - 4.4.2** Each Order shall specify:
 - 4.4.2.1** The Services required;
 - 4.4.2.2** The time periods for completion;
 - 4.4.2.3** The relevant Agreed Prices applicable
 - 4.5** The Services shall only be performed/delivered by the Contractor unless otherwise agreed in writing between the Parties
 - 4.6** The Contractor shall provide the Services in accordance with the Specification with all due skill, care and diligence and in accordance with good industry practice. The Council reserves the right to reject work at the Contractors expense if the Council deems it to be unacceptable and not in accordance with good industry practice and the Specification.
 - 4.7** The Contractor shall provide the Services in accordance with all current and relevant statutory provisions, regulations or other legislation from time to time in force relating to the provision of the Services
 - 4.8** The Contractor shall during the Term ensure that every person employed by the Contractor in the provision of the Services is properly trained and instructed with regard to his/her tasks in relation to the Services
 - 4.9** The Contractor shall carry out its own risk assessments relevant to the Services.
 - 4.10** The Contractor shall have a written procedure for dealing with complaints about the Services in accordance with clause 33 (Complaints) hereof
 - 4.11** before the Contractor engages or employs any person in the provision of the Services, or in any activity related to, or connected with, the provision of the Services, the Contractor must without limitation, complete the Employment Checks and any other checks required by the Disclosure and Barring Service
 - 4.12** Prior to the engagement by the Contractor of any staff or sub-contractor engaged to provide any part of the Services where such individuals will have contact with children up to the age of eighteen years old or where the

performance of the Services may involve contact with vulnerable adults (as defined in the Safeguarding Vulnerable Groups Act 2006) the Contractor shall procure in respect of all staff or potential staff or other persons intended to perform any part of the Services:

4.12.1 that each person being considered for engagement be questioned as to whether he/she has any convictions; and

4.12.2 that the results of a Disclosure and Barring Service (DBS) check of the most extensive available kind is obtained in accordance with Part V of the Police Act 1997 (as amended) and that each DBS check should include a search of the list held pursuant to the Protection of Children Act 1999 where the performance of the Service may involve contact with children and/or Safeguarding Vulnerable Groups Act 2006 where the performance of the Service may involve contact with vulnerable adults.

4.12.3 that a copy of the DBS check results are notified to the Council

4.13 The Parties agree that there shall be, on dates to be agreed, regular informal reviews of the progress of the development of the Services between the Contractor and the Council and to ensure that the Outcomes are being achieved.

4.14 In the event that an informal review reveals that the Services are not being delivered as required or that Outcomes are not being met, a formal Review meeting shall take place between the Parties upon 14 days written notice being given to the Contractor by the Council

4.15 The Review meeting shall record in writing any amendments to the Outcomes agreed between the Council and the Contractor.

4.16 Where following a Review, the Council acting reasonably determines that the Contractor has not delivered the Services as required or met the Outcomes the Council may:

4.16.1 further to clause 28.1 of this Agreement serve the Contractor with an Improvement (Amber) Notice ("Notice") within one month of the Review meeting specifying which areas of the Services have not been delivered as required and/or which of the Outcomes it considers that the Contractor has not met or failed to achieve and giving the Contractor not less than 14 days

from the date of the Notice to remedy the failure within the time period specified in the Notice ('rectification period')

4.16.2 if after the expiry of the rectification period the Contractor has failed to remedy the failure specified in the Notice then, depending on the severity of the failings of the Contractor, the Council may, in its absolute discretion, continue to serve further notices in accordance with the procedures set out in clauses 28.2 – 28.4 or consider the Contractor's non-compliance with the Notice to be a material breach of the terms of this Agreement to the extent that the Agreement may be terminated in accordance with the provisions contained in clause 38 (Termination) herein

5. Use of Facilities: NOT USED

6 Insurance

- 6.1** The Contractor shall effect and maintain with a reputable insurance company a policy or policies of insurance providing an adequate level of cover, or in accordance with any legal requirement for the time being in force, in respect of all legal liability which may be incurred by the Contractor, arising out of the Contractor's performance of this Agreement, including death or personal injury, loss of or damage to property or any other loss, and unless otherwise agreed with the Council such policy or policies of Public Liability and Employers Liability insurance shall provide for a minimum indemnity limit of £5,000,000 (FIVE MILLION POUNDS) for each and every claim.
- 6.2** If appropriate and requested in Writing, the Contractor may also be required to provide Product Liability insurance of at least £2,000,000 (TWO MILLION POUNDS) cover for any one claim
- 6.3** Not Used
- 6.4** The Contractor warrants that it has complied with this clause 6 and shall provide the Council with certified copies of the relevant policy documents (including any warranties or exclusions) together with receipts or other evidence of payment of the latest premiums due under those policies prior to the commencement of this Agreement and annually thereafter during the Term. If, for whatever reason, the Contractor fails to give effect to and maintain the insurances required under this clause 6, the Council may make

alternative arrangements to protect its interests and may recover the costs of such arrangements from the Contractor.

6.5 The Contractor shall:

- (a) do nothing to invalidate any insurance policy
- (b) notify the Council if any policy is (or will be) cancelled or its terms are (or will be) subject to any material change

6.6 For the avoidance of doubt, the terms of any insurance or the amount of cover shall not relieve the Contractor of any liabilities under this Agreement.

6.7 Where the minimum limit of indemnity required in relation to any of the insurances is specified as being "in the aggregate":

6.7.1 if a claim or claims which do not relate to this Agreement are notified to the insurers which, given the nature of the allegations and/or the quantum claimed by the third party(ies), is likely to result in a claim or claims being paid by the insurers which could reduce the level of cover available below that minimum, the Contractor shall immediately submit to the Council:

- (i) details of the policy concerned; and
- (ii) its proposed solution for maintaining the minimum limit of indemnity specified; and

6.7.2 if and to the extent that the level of insurance cover available falls below that minimum because a claim or claims which do not relate to this Agreement are paid by insurers, the Contractor shall:

- (i) ensure that the insurance cover is reinstated to maintain at all times the minimum limit of indemnity specified for claims relating to this Agreement;
- or

- (ii) if the Contractor is or has reason to believe that it will be unable to ensure that insurance cover is reinstated to maintain at all times the minimum limit of indemnity specified, immediately submit to the Council full details of the policy concerned and its proposed solution for maintaining the minimum limit of indemnity specified.

7 **Indemnity**

7.1 The Contractor shall fully indemnify the Council against all liabilities, costs, expenses, damages losses and breach of its statutory duties or breach of an obligation under the Data Protection Legislation (including any direct,

indirect or consequential losses, loss of profit, loss of reputation and all interest, penalties and legal and other reasonable professional costs and expenses) suffered or incurred by the Council arising out of or in connection with:

- (a) The performance, defective performance or otherwise of this Agreement by the Contractor or the Contractor Personnel
- (b) Any claim made against the Council for actual or alleged infringement of a third party's Intellectual Property Rights arising out of, or in connection with the provision of the Services
- (c) Any claim made against the Council by a third party arising out of, or in connection with, the supply of the Services, to the extent that such claim arises out of the breach, negligent performance or failure or delay in performance of this Agreement by the Contractor or the Contractor Personnel; and
- (d) Any claim made against the Council by a third party for death, personal injury or damage to property arising out of, or in connection with the delivery of the Services and performance of this Agreement to the extent that the defective performance is attributable to the acts or omissions of the Contractor or the Contractor Personnel

7.2 The Council shall indemnify the Contractor against all reasonable claims, costs and expenses which the Contractor may incur and which arise, directly from the Council's breach of any of its obligations under this Agreement.

7.3 Nothing in this Agreement shall limit or exclude the liability of either Party for:

- (a) death or personal injury resulting from negligence; or
- (b) fraud or fraudulent misrepresentation; or
- (c) the indemnities given in this clause 7

8. Fee rates based on time spent

Where the Fees calculated on the amount of time spent by the Contractor's Personnel, the following applies:

8.1 a 'day' will mean 7.4 hours. This will include the time spent in travelling to and from the place where the Services are performed. Where the work

carried out in performing the Services exceeds the period of 7.4 hours, that period shall be charged at the pro-rated rate for a day;

8.2 where the Fees are based on an hourly rate, any time spent which is less than an hour is charged on a pro-rated basis.

8.3 For the avoidance of doubt, the Contractor shall only charge the Council the Fees based on the actual time spent on-site carrying out the Services. The Contractor shall not charge any Fees with respect to mileage and travel time to and from the Properties unless expressly permitted by the Council in writing and in advance

9. Payment

9.1 Payment of the Fee(s) shall be made by the Council to the Contractor within 30 days of receipt of an undisputed Valid Invoice in arrears

9.2 To assist payment of a Valid Invoice the Contractor shall also, where possible provide PSG with the following additional information:

9.2.1 Name of officer that placed the Order for works;

9.2.2 Date and time of when the Order was placed;

9.2.3 Date of visit;

9.2.4 Times of arrival and departure from the site;

9.2.5 Where applicable, sub-contractors details;

9.2.6 A list of materials used to complete the works together with the cost of each item and their mark-up (the Council reserves the right to request copies of supplier's invoices to verify cost mark-up against trade price of materials used against the values stated in the Tender).;

9.2.7 worksheet signed by an authorised officer; and

9.2.8 with respect to repair invoices: quotation/tender reference

9.3 The Parties agree that where the Contractor fails to submit a Valid Invoice, the Council shall be entitled to withhold payment until the Contractor submits the information required by the Council.

9.4 In the event of late payment, interest thereon shall be charged at the prevailing statutory rate further to the Late Payment of Commercial Debts (Interest) Act 1998 above the National Westminster Bank base rate.. Such interest shall accrue daily from the due date until actual payment of the

overdue amount, whether before or after Judgment.

- 9.5** The Contractor shall not be entitled to vary the Fee(s) during the Initial Term of this Agreement unless with the prior written consent of the Council.
- 9.6** The Contractor shall not charge, and the Council shall not be liable, for any expenses, charges, costs, fees except the Fee(s) as set out in this Agreement. For the avoidance of doubt, the Contractor shall only charge the Council the Fees based on the actual time spent on-site carrying out the Services. The Contractor shall not charge any Fees with respect to mileage and travel time to and from the Properties unless expressly permitted by the Council in writing and in advance
- 9.7** All amounts stated are exclusive of VAT which will be charged in addition at the rate in force at the time the Council is required to make payment
- 9.8** Unless otherwise agreed in writing by the Council, the Contractor will pay any of its appointed sub-contractors within the time period specified in the Sub-Contract but in any event no later than 30 days from receipt of an undisputed invoice.

10. The Council's Obligations

To enable the Contractor to perform its obligations under this Agreement the Council shall:

- 10.1** Co-operate with the Contractor and ensure that the Council's staff and agents co-operate with and assist the Contractor as is reasonable and appropriate
- 10.2** Provide the Contractor with any information reasonably required by the Contractor;
- 10.3** Comply with such other requirements as may be otherwise agreed between the parties.
- 10.4** Not Used
- 10.5** Save as provided in this Agreement, no representations, warranties or conditions are given or assumed by the Council in respect of any information which is provided to the Contractor by the Council and any such representations, warranties or conditions are excluded, save to the extent that such exclusion is prohibited by law.

11. Authorised Officer and Contractor Representative:

- 11.1** The Authorised Officer shall be appointed by the Council to act in the name of the Council for the purposes of the contract evidenced by this Agreement.
- 11.2** The Contractor shall appoint a Contractor Representative to act in the name of the Contractor for the purposes of the contract evidenced by this Agreement
- 11.3** The Parties shall notify each other in writing of any replacement Authorised Officer or Contractor Representative or if any person ceases to be either the Authorised Officer or Contractor Representative.
- 11.4** The Authorised Officer shall monitor on behalf of the Council, the provision of the Services supplied by the Contractor and act as liaison officer with the Contractor's Representative in respect of the operation of the Services. Any issues raised by the Authorised Officer with regard to the delivery of the Services shall in the first instance be addressed and dealt with by the Contractor's Representative on the Contractor's behalf.

12. Intellectual Property

- 12.1** In the absence of prior written agreement by the Council to the contrary, all Intellectual Property created by the Contractor or any employee, agent or subcontractor of the Contractor:
 - 12.1.1** in the course of performing the Services; or
 - 12.1.2** exclusively for the purpose of performing the Services,shall vest in the Council on creation.
- 12.2** Unless stated expressly in writing in this Agreement, neither Party will acquire any ownership interest in or licence of the other's Intellectual Property by virtue of this Agreement
- 12.3** The Contractor shall indemnify the Council against all claims, demands, actions, costs, expenses (including legal costs and disbursements on a solicitor and client basis), losses and damages arising from or incurred by reason of any infringement or alleged infringement (including the defence of such alleged infringement) of any Intellectual Property Right by the availability of the Services, except to the extent that they have been caused by or contributed to by the Council's acts or omissions.

12.4 This provision shall survive the expiration or termination of the Agreement.

13. Confidentiality

13.1 All plans, drawings, designs or specifications supplied by the Council to the Contractor shall remain the exclusive property of, and shall be returned to the Council on completion of the Agreement and shall not be copied, and no information relating to the Goods or the Services shall be disclosed to any third party, except as required for the purpose of this Agreement.

13.2 No photographs of any of the Council's equipment, installations or property shall be taken without the Council's prior consent in writing. The Contractor shall keep secret and shall not divulge to any third party (except sub-contractors accepting a like obligation of secrecy, and then only to the extent necessary for the performance of the sub-agreement) all information given by the Council in connection with the Agreement or which becomes known to the Contractor through his performance of the Agreement or use the same other than for the purpose of executing the Agreement.

13.3 The Contractor shall not mention the Council's name in connection with the Agreement or disclose the existence of the Agreement in any publicity material or other similar communication to third parties without the Council's prior consent in writing.

13.4 The Contractor will keep confidential any information it becomes aware of by reason of the operation of this Agreement.

13.5 Except to the extent set out in this clause or where disclosure is expressly permitted elsewhere in this Agreement, each party shall:

13.5.1 treat the other party's Confidential Information as confidential; and

13.5.2 not disclose the other party's Confidential Information to any other person without the owner's prior written consent

13.6 Clause 13.5 shall not apply to the extent that:

13.6.1 such disclosure is a requirement of law placed upon the party making the disclosure, including any requirements for disclosure under the Audit Commission Act 1998 or under the FOIA or the Environmental Information Regulations pursuant to clause 25 regarding Freedom of Information;

- 13.6.2** such information was in the possession of the party making the disclosure without obligation of confidentiality prior to its disclosure by the information owner;
- 13.6.3** such information was obtained from a third party without obligation of confidentiality;
- 13.6.4** such information was already in the public domain at the time of disclosure otherwise than by a breach of this Agreement; or
- 13.6.5** it is independently developed without access to the other party's Confidential Information.
- 13.7** The Contractor may only disclose the Council's Confidential Information to the Contractor Personnel who are directly involved in the provision of the Services and who need to know the information, and shall ensure that such Contractor Personnel are aware of and shall comply with these obligations as to confidentiality.
- 13.8** The Contractor shall not, and shall procure that the Contractor Personnel do not, use any of the Council's Confidential Information received otherwise than for the purposes of this Agreement
- 13.9** Nothing in this Agreement shall prevent the Council from disclosing the Contractor's Confidential Information:
- 13.9.1** to any consultant, contractor or other person engaged by the Council;
- 13.9.2** for the purpose of the examination and certification of the Council's accounts or any other form of audit of the Council;
- 13.10** The Council shall use all reasonable endeavours to ensure that any government department, employee, third party or Sub-contractor to whom the Contractor's Confidential Information is disclosed pursuant to this Agreement is made aware of the Council's obligations of confidentiality.
- 13.11** Nothing in this clause shall prevent either party from using any techniques, ideas or know-how gained during the performance of the Agreement in the course of its normal business to the extent that this use does not result in a disclosure of the other party's Confidential Information or an infringement of Intellectual Property Rights.
- 13.12** The provisions of this Clause shall survive the expiration or termination of this Agreement.

14. Agreement and Transparency

- 14.1** Further to the Local Government Transparency Code 2015 the Council is obliged to publish details of expenditure exceeding £500. The Parties acknowledge that, except for any information which is exempt from disclosure in accordance with the provisions of the FOIA, the content of this Agreement and any associated tender documentation provided by the Contractor (the Tender Submission) is not Confidential Information. The Council shall be responsible for determining in its absolute discretion whether any of the content of the Agreement or the Tender Submission is exempt from disclosure in accordance with the provisions of the FOIA.
- 14.2** Notwithstanding any other term of this Agreement, the Contractor hereby gives his consent for the Council to publish this Agreement and the Tender Submission in its entirety, including from time to time agreed changes to the Agreement, to the general public.
- 14.3** The Council may consult with the Contractor to inform its decision regarding any exemptions but the Council shall have the final decision in its absolute discretion.
- 14.4** The Contractor shall assist and cooperate with the Council to enable the Council to publish this Agreement and the Tender Submission.

15 Council Data

- 15.1** The Contractor shall not delete or remove any copyright or proprietary notices contained within or relating to the Council Data.
- 15.2** The Contractor shall not store, copy, disclose, or use the Council Data except as necessary for the performance by the Contractor of its obligations under this Agreement or as otherwise expressly authorised in writing by the Council and in particular the Contractor shall not store any Council Data, which the Council has notified the Contractor requires storage in an encrypted format, on any portable device or media unless that device is encrypted.
- 15.3** To the extent that Council Data is held and/or processed by the Contractor, the Contractor shall supply that Council Data to the Council as requested by the Council in any format specified in this Agreement or if none specified in any format reasonably requested by the Council.

- 15.4** The Contractor shall take responsibility for preserving the integrity of Council Data and preventing the corruption or loss of Council Data and shall take such back-up copies of the Council Data at regular intervals appropriate to the frequency of the revision of the Council Data.
- 15.5** The Contractor shall ensure that any system on which the Contractor holds any Council Data, including back-up data, is a secure system to include, but not limited to, the following requirements:
- a) Access to the system is restricted to Contractor Personnel with a legitimate need to access the Council Data; and
 - b) The system is kept up to date with the latest versions of operating system and anti-virus updates; and
 - c) Transfer of data to and from the system is conducted in a secure manner.
- 15.6** If the Council Data is corrupted, lost or sufficiently degraded as a result of the Contractor's Default so as to be unusable, the Council may:
- 15.6.1** require the Contractor (at the Contractor's expense) to restore or procure the restoration of Council Data as soon as practicable; and/or
- 15.6.2** itself restore or procure the restoration of Council Data, and shall be repaid by the Contractor any reasonable expenses incurred in doing so including the restoration of the Council's Data.
- 15.7** If at any time the Contractor suspects or has reason to believe that Council Data has or may become corrupted, lost or sufficiently degraded in any way for any reason, then the Contractor shall notify the Council via the Council's ICT Helpdesk immediately and inform the Council of the remedial action the Contractor proposes to take.
- 15.8** The Contractor shall check for and delete Malicious Software and if Malicious Software is found, the parties shall co-operate to reduce the effect of the Malicious Software and, particularly if Malicious Software causes loss of operational efficiency or loss or corruption of Council Data, assist each other to mitigate any losses and to restore the Services to their desired operating efficiency.

15.9 Any cost arising out of the actions of the parties taken in compliance with the provisions of sub-clause 15.8 above shall be borne by the parties as follows:

15.9.1 by the Contractor where the Malicious Software originates from the Contractor Software, the Third Party Software or the Council Data (whilst the Council Data was under the control of the Contractor); and

15.9.2 by the Council if the Malicious Software originates from the Council Software or the Council Data (whilst the Council Data was under the control of the Council).

16. **Not Used**

17. **Not Used**

18. **Data Protection**

18.1 Both parties will comply with all applicable requirements of the Data Protection Legislation and agree to take account of any guidance issued by the Information Commissioner's Office. This clause 18 is in addition to, and does not relieve, remove or replace, a party's obligations under the Data Protection Legislation.

18.2 where there is any conflict, ambiguity or inconsistency between this clause (including any associated definitions) and the remainder of this Agreement, this clause 18 shall take precedence.

18.3 The parties acknowledge that for the purposes of the Data Protection Legislation and for the remainder of this clause 18 where the context so admits, the Council is the Data Controller and the Contractor is the Data Processor unless otherwise specified in Schedule 5. Schedule 5 sets out the scope, nature and purpose of processing by the Contractor, the duration of the processing and the types of Personal Data and categories of Data Subject.

18.4 Not Used

Data Processor's Obligations

18.5 Without prejudice to the generality of Clause 18.1, the Council will ensure that it has all necessary appropriate consents and notices in place to enable lawful transfer of the Personal Data to the Contractor and/or lawful collection

of the Personal Data by the Contractor on behalf of the Council for the duration and purposes of this Agreement.

18.6 Without prejudice to the generality of Clause 18.1, the Contractor shall, in relation to any Personal Data processed in connection with the performance by the Contractor of its obligations under this Agreement:

- (a) process that Personal Data only on the documented written instructions of the Council as set out in Schedule 5 unless the Contractor is required by Domestic Law to otherwise process that Personal Data. Where the Contractor is relying on Domestic Law as the basis for processing Personal Data, the Contractor shall promptly notify the Council of this before performing the processing required by the Domestic Law unless the Domestic Law prohibits the Contractor from so notifying the Council;
- b) ensure that it has in place appropriate technical and organisational measures, reviewed and approved by the Council, to protect against unauthorised or unlawful processing of Personal Data and against accidental loss or destruction of, or damage to, Personal Data, appropriate to the harm that might result from the unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the data to be protected, having regard to the state of technological development and the cost of implementing any measures (those measures may include, where appropriate, pseudonymising and encrypting Personal Data, ensuring confidentiality, integrity, availability and resilience of its systems and services, ensuring that availability of and access to Personal Data can be restored in a timely manner after an incident, and regularly assessing and evaluating the effectiveness of the technical and organisational measures adopted by it);
- (c) ensure that all personnel who have access to and/or process Personal Data are obliged to keep the Personal Data confidential; and
- (d) not transfer any Personal Data outside of the UK unless the prior written consent of the Council has been obtained and the following

- conditions are fulfilled:
- (i) the Contractor has provided appropriate safeguards in relation to the transfer as determined by the Council;
 - (ii) the Data Subject has enforceable rights and effective legal remedies;
 - (iii) the Contractor complies with its obligations under the Data Protection Legislation by providing an adequate level of protection to any Personal Data that is transferred; and
 - (iv) the Contractor complies with reasonable instructions notified to it in advance by the Council with respect to the processing of the Personal Data;
- (e) notify the Council immediately if it receives:
- i) a request from a Data Subject to have access to that person's Personal Data;
 - (ii) a request to rectify, block or erase any Personal Data;
 - (iii) receives any other request, complaint or communication relating to either Party's obligations under the Data Protection Legislation (including any communication from the Information Commissioner);
- (f) assist the Council in responding to any request from a Data Subject and in ensuring compliance with its obligations under the Data Protection Legislation with respect to security, breach notifications, impact assessments and consultations with supervisory authorities or regulators;
- (g) notify the Council without undue delay on becoming aware of a Personal Data Breach including without limitation any event that results, or may result, in unauthorised access, loss, destruction, or alteration of Personal Data in breach of this Agreement ;
- (h) at the written direction of the Council, delete or return Personal Data and copies thereof to the Council on termination of the Agreement unless required by Domestic Law to store the Personal Data; and
- i) maintain complete and accurate records and information to

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demonstrate its compliance with this clause 18 and allow for audits by the Council or the Council's designated auditor and immediately inform the Council if, in the opinion of the Contractor, an instruction infringes the Data Protection Legislation

- 18.7** The Contractor shall indemnify the Council against any losses, damages, cost or expenses incurred by the Council arising from, or in connection with, any breach of the Contractor's obligations under this Clause 18.
- 18.8** The Council consents to the Provider appointing a Sub-Processor as a third-party processor of Personal Data under this Agreement. The Contractor confirms that it has entered or (as the case may be) will enter with the Sub-processor into a written agreement incorporating terms which are substantially similar to those set out in this clause 18 and which the Sub-Processor undertakes reflect and will continue to reflect the requirements of the Data Protection Legislation. As between the Council and the Contractor, the Contractor shall remain fully liable for all acts or omissions of any third-party processor appointed by it pursuant to this clause 18
- 18.9** The Council may, at any time on not less than 30 days' notice, revise this clause 18 by replacing it with any applicable controller to processor standard clauses or similar terms adopted by the Information Commissioner or forming part of an applicable certification scheme (which shall apply when replaced by attachment to this Agreement).

19. Council Data and Personal Information Audits

- 19.1** Except where an audit is imposed on the Council by a Regulatory body, the Council may, acting reasonably, conduct an audit for the following purposes:
- 19.1.1** to review the integrity, confidentiality and security of the Council Data;-
- 19.1.2** to review the Contractor's compliance with the Data Protection Legislation, the Freedom of Information Act 2000 in accordance with the Protection of Personal Data and Freedom of Information clauses and any other legislation applicable to the Services;

- 19.2** The Council shall use its reasonable endeavours to ensure that the conduct of each audit does not unreasonably disrupt the Contractor or delay the provision of the Services.
- 19.3** Subject to the Council's obligations of confidentiality, the Contractor shall on demand provide the Council (and/or its agents or representatives) with all reasonable co-operation and assistance in relation to each audit, including:
- 19.3.1** all information requested by the Council within the permitted scope of the audit;
- 19.3.2** reasonable access to any sites controlled by the Contractor and to any equipment used (whether exclusively or non-exclusively) in the performance of the Services;
- 19.3.3** access to Contractor Personnel
- 19.4** The Contractor shall implement all measurement and monitoring tools and procedures necessary to measure and report on the Contractor's performance of the Services.
- 19.5** The Council shall endeavour to (but is not obliged to) provide at least 5 Working Days notice of its intention to conduct an audit.
- 19.6** The Parties agree that they shall bear their own respective costs and expenses incurred in respect of compliance with their obligations under this clause.
- 19.7** This clause shall not apply to any audit or inspection regarding the provision of the Services specified in the Service Specification or elsewhere in this Agreement which may be conducted as specified in this Agreement.
- 20. Assignment, Transfer and Sub-contracting**
- 20.1** Neither Party shall be entitled to assign, novate or otherwise dispose of any or all of its rights and obligations under this Agreement without the prior written consent of the other Party PROVIDED that the Council may,
- (a) assign any of its rights under this Agreement; or
- (b) transfer all of its rights or obligations by novation, to another person.

without the Contractor's consent where such assignment, transfer or novation is to an Associated Person of the Council;

20.2 Any consent required under Clause 20.1 must not be unreasonably withheld or delayed and if not expressly refused within five Working Days shall be deemed given.

20.3 The Contractor will not, without the written consent of the Council, sub-contract its right or obligations under this Agreement nor allow Services to be provided other than through the Contractor Personnel and using its own equipment.

20.4 In the event that consent is given by either Party to the other Party to the placing of sub-contracts, copies of each sub-contract and Order shall be sent by the sub-contracting Party to the consenting Party immediately it is issued

20.5 Subject to clause 20.1, in the event that either Party wishes to assign its rights and obligations under this Agreement, the assignor must obtain a written undertaking from the assignee to the consenting Party that it will be bound by the obligations of the assignor under this Agreement.

20.6 Notwithstanding the Contractor's right to sub-contract pursuant to this clause 20, the Contractor shall remain responsible for all acts and omissions of its Sub-contractors and the acts and omissions of those employed or engaged by the Sub-Contractors as if they were its own and shall be responsible for the work of the Sub-Contractor whose work shall be undertaken to the same standard as stated in the Specification.

21. Public Interest Disclosure ('Whistleblowing')

The Contractor will ensure that his employees and agents are made aware of the Council's policy "Speaking Up About Wrongdoing" and that the details of this policy are fully explained to them and shall provide the Council with evidence of doing so upon request.

22. Publicity

The Contractor will not make any press or other release or public announcement in relation to this Agreement without the prior approval of the Council

23. Prevention of Bribery

23.1 The Contractor:

- a) shall not, and shall procure that all Contractor Personnel shall not, in connection with this Agreement commit a Prohibited Act;
- b) warrants, represents and undertakes that it is not aware of any financial or other advantage being given to any person working for or engaged by the Council, or that an agreement has been reached to that effect, in connection with the execution of this Agreement, excluding any arrangement of which full details have been disclosed in writing to the Council before execution of this Agreement.

23.2 The Contractor shall:

- a) if requested, provide the Council with any reasonable assistance, at the Council's reasonable cost, to enable the Council to perform any activity required by any relevant government or agency in any relevant jurisdiction for the purpose of compliance with the Bribery Act;
- b) the Contractor shall, within 10 Working Days of a request from the Council, certify to the Council in writing (such certification to be signed by an officer of the Contractor) the Contractor's compliance with this clause 23 and provide such supporting evidence of compliance with this clause 23 by the Contractor as the Council may reasonably request.

23.3 If any breach of clause 23.1 is suspected or known, the Contractor must notify the Council immediately.

23.4 If the Contractor notifies the Council that it suspects or knows that there may be a breach of clause 23.1, the Contractor must respond promptly to the Council's enquiries, co-operate with any investigation, and allow the Council to audit books, records and any other relevant documentation. This obligation shall continue for two years following the expiry or termination of this Agreement.

23.5 The Council may terminate this Agreement by written notice with immediate effect, and recover from the Contractor the amount of any loss directly resulting from the cancellation, if the Contractor or Contractor Personnel (in all cases whether or not acting with the Contractor's knowledge) breaches clause 23.1. At the Council's absolute discretion, in determining whether to exercise the right of termination under this clause 23.5, the Council shall give consideration, where appropriate, to action other than termination of

this Agreement unless the Prohibited Act is committed by the Contractor or a senior officer of the Contractor or by an employee, Sub-Contractor or supplier not acting independently of the Contractor. The expression "not acting independently of" (when used in relation to the Contractor or a Sub-Contractor) means and shall be construed as acting:

- a) with the Contractor; or,
- b) with the actual knowledge;
of any one or more of the directors of the Contractor or the Sub-Contractor (as the case may be); or
- c) in circumstances where any one or more of the directors of the Contractor ought reasonably to have had knowledge.

23.6 Any notice of termination under clause 23.5 must specify:

- a) the nature of the Prohibited Act;
- b) the identity of the party whom the Council believes has committed the Prohibited Act; and
- c) the date on which this Agreement will terminate.

23.7 Despite clause 34 (Disputes), any dispute relating to:

- a) the interpretation of this clause 23; or
 - b) the amount or value of any gift, consideration or commission,
- shall be determined by the Council and its decision shall be final and conclusive.

23.8 Any termination under clause 23.5 will be without prejudice to any right or remedy which has already accrued or subsequently accrues to the Council.

24. Warranties, liability and indemnities

The Contractor warrants, represents and undertakes that:

24.1 it will carry out the work by the Expiry Date

24.2 it will perform the Services with all due skill and diligence and in a good and workmanlike manner, and in accordance with the Best Practice within the industry of the Contractor and will have adequate numbers of Contractor Personnel to provide the Service

24.3 its Contractor Personnel will have the necessary skill, professional qualifications and experience to deliver the Services in accordance with the Specification and Best Practice

- 24.4** Not Used
- 24.5** it has full capacity and authority to enter into this Agreement
- 24.6** it has obtained all necessary and required licences, consents and permits to provide the Services
- 24.7** it shall be responsible for all costs, fees, expenses and charges for training necessary or required for the Contractor Personnel to perform the Services
- 24.8** NOT USED
- 24.9** The Contractor shall where appropriate take account of the Human Rights Act 1998 and shall not do anything in breach of it.
- 24.10** The Contractor will at all times in providing the Services to the Council comply with the provisions of the Health and Safety at work Act 1974 and provide evidence of doing so to the Council at any time upon request and:
- 24.10.1** The Contractor shall promptly notify the Council of any health and safety hazards which may arise in connection with the performance of this Agreement.
- 24.10.2** The Council shall promptly notify the Contractor of any health and safety hazards which may exist or arise at any of the Properties which may affect the Contractor in the performance of this Agreement.
- 24.10.3** The Contractor shall make itself aware of and will comply with any health and safety measures implemented by the Council with respect to Properties under its control and to health and safety measures implemented by the managers/owners of Properties which are not under the control of the Council
- 24.10.4** The Contractor shall report all accidents and/or injuries relating to the provision of the Services to the Council immediately.
- 24.10.5** The Contractor shall ensure that its health and safety policy statement (as required by the Health and Safety at Work etc. Act 1974) is made available to the Council upon request
- 24.11** The Contractor warrants that none of its current Directors have been involved in liquidation or receivership or have any criminal convictions.
- 24.12** If the Contractor performs the Services (or any part thereof) negligently or in breach of this Agreement ("defaulting works"), then if requested by the Council, the Contractor will re-perform the Services or relevant part thereof

at no additional cost to the Council within 28 days of such a request. The Council's request must be made within 6 months of it becoming aware of the defaulting works or in any event within 6 months of the Expiry Date or termination of this Agreement whichever is the later and the Contractor shall respond to such requests in accordance with paragraph 1.17 (Recalls) of the Specification

24.13 the Contractor warrants that the signing of this Agreement on its behalf has been validly authorised and the obligations expressed as being assumed by the Contractor under this Agreement constitute valid legal and binding obligations of the Contractor enforceable against the Contractor in accordance with their terms.

24.14 The Contractor acknowledges and confirms that:

- 24.14.1** it has had an opportunity to carry out a thorough due diligence exercise in relation to the Services and has asked the Council all the questions it considers to be relevant for the purpose of establishing whether it is able to provide the Services in accordance with the terms of this Agreement;
- 24.14.2** it has received all information requested by it from the Council pursuant to sub-clause 24.14.1 to enable it to determine whether it is able to provide the Services in accordance with the terms of this Agreement;
- 24.14.3** it has made and shall make its own enquiries to satisfy itself as to the accuracy and adequacy of any information supplied to it by or on behalf of the Council pursuant to sub-clause 24.14.2;
- 24.14.4** it has raised all relevant due diligence questions with the Council before the Commencement Date; and
- 24.14.5** it has entered into this Agreement in reliance on its own diligence
- 24.14.6** as at the Commencement Date, the Contractor warrants and represents that all information contained in the Tender remains true, accurate and not misleading, save as may have been specifically disclosed in writing to the Council

prior to execution of the Agreement AND shall promptly notify the Council in writing if it becomes aware during the performance of this Agreement of any inaccuracies in any information provided to it by the Council during such due diligence which materially and adversely affects its ability to perform the Services

24.14.7 The Contractor shall not be entitled to recover any additional costs from the Council which arise from, or be relieved from any of its obligations as a result of, any matters or inaccuracies notified to the Council by the Contractor in accordance with sub-clause 24.14.6 save where such additional costs or adverse effect on performance have been caused by the Contractor having been provided with fundamentally misleading information by or on behalf of the Council and the Contractor could not reasonably have known that the information incorrect or misleading at the time such information was provided.

24.15 The Contractor agrees that where requested in writing during the term of this Agreement it will ensure that an appropriately authorised representative of the Contractor shall attend a Committee meeting of the Council upon being invited to do so by the Council

24.16 In performing its obligations under this Agreement, the Contractor shall and shall ensure that each of its sub-contractors shall comply with all applicable anti-slavery and human trafficking laws, statutes, regulations and codes from time to time in force including but not limited to the Modern Slavery Act 2015

25. Freedom of Information Act 2000 & Environmental Information Regulations 2004

25.1 The Contractor acknowledges that the Council is subject to the requirements of the FOIA and the Environmental Information Regulations

and shall assist and cooperate with the Council to enable the Council to comply with its Information disclosure obligations.

25.2 The Contractor shall notify the Council of any Commercially Sensitive Information provided to the Council together with details of the reasons for its sensitivity and the Contractor acknowledges that any lists or schedules of Commercially Sensitive Information so provided are of indicative value only and that the Council may be obliged to disclose such information.

25.3 The Contractor shall and shall procure that its Sub-contractors shall:

25.3.1 transfer to the Council all Requests for Information that it receives as soon as practicable and in any event within two Working Days of receiving a Request for Information;

25.3.2 provide the Council, at the Contractor's expense, with a copy of all Information in its possession, or power in the form that the Council requires within five Working Days (or such other period as the Council may specify) of the Council's request; and

25.3.3 provide, at the Contractor's expense, all necessary assistance as reasonably requested by the Council to enable the Council to respond to the Request for Information within the time for compliance set out in section 10 of the FOIA or regulation 5 of the Environmental Information Regulations.

25.4 The Council shall be responsible for determining in its absolute discretion and notwithstanding any other provision in this Agreement or any other agreement whether the Commercially Sensitive Information and/or any other Information is exempt from disclosure in accordance with the provisions of the FOIA or the Environmental Information Regulations and in considering any response to a Request for Information the Council may consult with the Contractor prior to making any decision or considering any exemption.

25.5 In no event shall the Contractor respond directly to a Request for Information unless expressly authorised to do so by the Council.

25.6 The Contractor acknowledges that (notwithstanding the provisions of this Freedom of Information clause) the Council may, acting in accordance with the Department of Constitutional Affairs' Code of Practice on the

Discharge of the Functions of Public Authorities under Part 1 of the Freedom of Information Act 2000 ("the Code"), be obliged under the FOIA, or the Environmental Information Regulations to disclose information concerning the Contractor or the Services:

25.6.1 in certain circumstances without consulting the Contractor; or

25.6.2 following consultation with the Contractor and having taken their views into account;

provided always that where sub-clause 25.6.1 above applies the Council shall, in accordance with any recommendations of the Code, take reasonable steps, where appropriate, to give the Contractor advanced notice, or failing that, to draw the disclosure to the Contractor's attention after any such disclosure.

25.7 The Contractor shall ensure that all Information required to be produced or maintained under the terms of this Agreement, or by law or professional practice or in relation to the Agreement is retained for disclosure for at least the duration of the Agreement plus one year together with such other time period as required by the Agreement, law or practice and shall permit the Council to inspect such records as requested from time to time.

25.8 The Council shall in no event be liable for any loss, damage, harm, or detriment, howsoever caused, arising from or in connection with the reasonable disclosure under FOIA, or any other law, of any information (including Exempt Information) whether relating to this Agreement or otherwise relating to any other party.

26 **Not Used**

27. **Equalities**

27.1 The Contractor and any Sub-Contractor employed by the Contractor shall not unlawfully discriminate either directly or indirectly on such grounds as race or ethnic origin, disability, gender, sexual orientation, religion or belief, or age

- a) in the supply and provision of Services under this Agreement, and
- b) in its employment practices.

27.2 Without prejudice to the generality of the foregoing, the Contractor shall not unlawfully discriminate within the meaning and scope of the Equality Act

2010 (or other relevant legislation, or any statutory modification or re-enactment thereof).

27.3 In addition, the Contractor and any Sub-Contractor or person(s) employed by or under the control of the Contractor in providing Services to the Council will comply with the general duty imposed on local authorities by Section 149 of the Equality Act 2010 to eliminate discrimination, harassment and victimisation and promote equality of opportunity between persons who share a protected characteristic and those who do not share it and to foster good relations between persons who share a protected characteristic and those who do not share it

27.4 The Contractor and any Sub-Contractor will take all reasonable steps to observe as far as possible the Codes of Practice produced by Equality and Human Rights Commission, which give practical guidance to Councils on the elimination of discrimination.

27.5 In the event of any finding of unlawful discrimination being made against the Contractor and any Sub-Contractor during the contract period, by any court or employment tribunal, or any adverse finding or formal investigation by the Equality and Human Rights Commission over the same period, the Contractor and any Sub-Contractor shall inform the Council of this finding and shall take appropriate steps to prevent repetition of the unlawful discrimination.

27.6 The Contractor and any Sub-Contractor employed by the Contractor will provide a copy of its policies to the Council at any time upon request. In addition, the Council may reasonably request other information from time to time for the purpose of assessing the Contractor's compliance with the above conditions.

28. Non-compliance

28.1. If the Council identifies areas of the Services through its RAG System which do not comply with the requirements of this Agreement (including any Schedules to this Agreement) it may send the Contractor a non-compliance notice referred to as an "Improvement (Amber) Notice" detailing

- (i) the areas of non-compliance;
- (ii) the action to be taken; and

(iii) the date by which the action must be taken (which for the avoidance of doubt must not be a date less than 14 days from the date of the notice).

28.2 If the Contractor fails to take any or all of the necessary action by the date given in the Improvement (Amber) Notice, the Council may send the Contractor a second non-compliance notice referred to as a "Registration of Concern (Amber) Notice" detailing the outstanding:

- (i) areas of non-compliance;
- (ii) actions to be taken;
- (iii) a requirement for an immediate response to the matters raised and reasons given for poor performance; and
- (iv) if considered necessary by the Council, a requirement for the Contractor to attend a formal meeting to explain its reasons for poor performance and to provide mitigation.

28.3 If, in the reasonable opinion of the Council, the Contractor fails to undertake all of the remedial actions in the Registration of Concern (Amber) Notice within the time period stated it may then issue the Contractor with a final non-compliance notice referred to as a "Warning (Red) Notice which shall:

- (i) detailing the areas of non-compliance; and
- (ii) setting out the actions still required to be taken; and
- (iii) notification that failure to adhere to the Warning (Red) may lead to termination of the contract

28.4 Failure to comply with the Warning (Red) Notice may be considered a material breach of this Agreement and the Council shall be entitled to take either of the following steps depending on the seriousness of the non-compliance (which in the event of dispute shall be determined in accordance with clause 34 (Disputes):

- (a) to make arrangements to take its own corrective action either itself or through the appointment of another Contractor and to either:
 - (i) deduct all costs in connection therewith from any sums due or to become due to the Contractor under the terms of this Agreement; or
 - (ii) to recover such sums from the Contractor as a debt;

And/or

- (b) issue a Termination (Red) Notice to terminate the Agreement in

accordance with clause 38 Termination

29. Waiver

The failure by either Party to enforce at any time or for any period any one or more of the terms and conditions herein shall not be a waiver of them or of the right at any time subsequently to enforce all the terms and conditions of this Agreement.

30. Sustainability

The Contractor will at all times use its best endeavours to assist the Council and operate themselves in a manner which meets the aims and objectives set out in the sustainable policies of the Council, copies of which are available on the Council's website

31. Audit And Monitoring

The Contractor will allow access for the Council and its officers to all relevant information for the purposes of audit and the monitoring of this Agreement.

32. Safeguarding NOT USED

33. Complaints Procedure

33.1 The Contractor shall operate a complaints procedure in respect of any services or works provided under this Agreement to deal with any complaint received about the standard of services or the manner in which any services have been supplied or work has been performed or any other matter connected with the performance of the Contractor's obligations under this Agreement ("the Complaints Procedure"). For the avoidance of doubt any complaint or issue that the Council has in respect of the Contractor's performance of this Agreement shall be dealt with in accordance with the remainder of this Agreement.

33.2 The Contractor's Complaints Procedure shall comply with applicable Law and the requirements of any regulatory body to which the Contractor is subject or which are applicable to the service being provided (including any change in such requirements) and shall meet the following minimum standards:

33.2.1 is easy for complainants to access and understand

33.2.2 clearly sets out time limits for responding to complaints and keeping the complainant and the Council informed of progress;

- 33.2.3** provides confidential record keeping to protect employees under this Agreement and the complainant
- 33.2.4** provides information to the Contractor's management so that services can be improved
- 33.2.5** provides effective and suitable remedies
- 33.2.6** is regularly monitored and audited and which takes account of complainant and Council feedback
- 33.3** The Contractor shall inform any users of the services or works provided under this Agreement of the existence of the complaints procedure and how to access it and will make its Complaints Procedure available on request.
- 33.4** The Contractor shall investigate and deal with any complaints it receives about the services or works, whether direct from the public or services users, or referred to it by the Council, in accordance with its published complaints procedure.
- 33.5** The Contractor shall ensure that:
- 33.5.1** it promptly, and within a maximum of 10 days of receiving the complaint, notifies the complainant that the Contractor is dealing with the complaint
 - 33.5.2** under no circumstances is a complaint investigated by a member of its staff employed under this contract who may be part of the complaint.
 - 33.5.3** someone who is independent of the matter complained of carries out the investigation
 - 33.5.4** the complainant is made aware that they are entitled to have the complaint investigated by the Council if they are not satisfied with either the process of investigation or finding of the Contractor's investigations
 - 33.5.5** it deals with the complaint fully, expeditiously and fairly and shall use its reasonable endeavours to resolve the complaint within 21 Working Days of receiving the complaint
 - 33.5.6** where a complaint is received by the Contractor relating to the policy or decisions of the Council rather than the Contractor's

delivery of its obligations under this Agreement, the Contractor shall promptly, and within two Working Days, refer the complaint to the Council for investigation.

33.6 The Contractor shall ensure that all its employees and persons employed under this Agreement are made aware of its Complaints Procedure and shall designate one employee (who shall be identified to the Council) to whom a complaint may be referred should the complainant not be satisfied with the initial response to their complaint

33.7 The Contractor shall keep accurate and complete written records of all complaints received and the responses to them and shall make these records available to the Council within 5 Working Days of being requested or at 12 monthly intervals in any event.

33.8 Where the Council is investigating a complaint the Contractor is required to participate fully in all investigations within the timescales requested by the Council.

33.9 The Contractor should note that if a complaint is made to the Council by a third party relating to the services or works provided, the Local Government Ombudsman has the power to investigate such a complaint and the Council requires the Contractor to fully to co-operate in such investigation. If the Council is found guilty of maladministration or injustice by the Local Government Ombudsman because of the act or default of the Contractor the Contractor shall indemnify the Council in respect of the costs arising from such maladministration or injustice.

34. Disputes

34.1 If any dispute or difference shall arise between the parties as to the construction of this Agreement or any matter or thing of whatever nature arising under this Agreement or in connection with it then the same shall be dealt with as follows:-

34.1.1 In the first instance a special meeting of both the Parties shall be arranged on 14 days written notice to the other party and the matter shall be discussed and the representatives shall use their reasonable endeavours to resolve the dispute

34.1.2 If the dispute cannot be resolved in accordance with the preceding

sub-clause then either one of the Parties may serve the Council's Chief Executive and the Contractor or other authorised officer whose details have been notified to the Council, with notice of the dispute and those officers shall then appoint their representative to adjudicate and use their reasonable endeavours to resolve the dispute within 21 days of receipt of such notice

34.1.3 If the dispute cannot be resolved in accordance with the preceding sub-clause then it shall be referred to the Centre for Effective Dispute Resolution or such other mediation body as the Parties shall agree and the Parties shall then seek to resolve the dispute or difference amicably by using an alternative dispute resolution ("ADR") procedure (other than arbitration) acceptable to both Parties before pursuing any other remedies available to them. Each Party shall pay its own costs of such a referral.

35. Force Majeure

35.1 Neither the Council nor the Contractor shall be in breach of this Agreement nor liable for any failure or delay in performing their obligations under this Agreement where it is directly caused, arising from or attributable to acts, events, omissions or accidents beyond its reasonable control ("Force Majeure Event"), provided that:-

35.1.1 any delay by a sub-contractor or supplier of the Party who is delayed will not relieve that Party from liability for delay except where the delay is beyond the reasonable control of the sub-contractor or supplier concerned; and

35.1.2 staff or material shortages or strikes or industrial action affecting only the Party who is delayed will not relieve that Party from liability for delay.

35.2 If a Party is subject to a Force Majeure Event it shall not be in breach of this Agreement provided that:-

35.2.1 it promptly notified the other Party in writing of the nature and extent of the Force Majeure Event causing its failure or delay in performance; and

35.2.2 it has used its reasonable endeavours to mitigate the effect of the Force Majeure Event, to carry out its obligations under this Agreement in

any way that is reasonably practicable and to resume the performance of its obligations as soon as reasonably possible

in which case the performance of that Party's obligations will be suspended during the period that those circumstances persist and that Party will be granted a reasonable extension of time for performance up to a maximum equivalent to the period of the delay.

35.3 Save where that delay is caused by the act or failure to act of the other Party (in which event the rights, remedies and liabilities of the Parties will be those conferred by the other terms of this Agreement and by law):-

35.3.1 any costs arising from that delay will be borne by the Party incurring the same; and

35.3.2 either Party may, if that delay continues for more than 5 weeks, terminate this Agreement immediately on giving notice in writing to the other. Such termination shall be without prejudice to the rights of the parties in respect of any breach of this Agreement occurring prior to such termination.

36. Rights of Third Parties

The Parties to this Agreement do not intend that any of its terms will be enforceable by any person not a party to it by virtue of the Contracts (Rights of Third Parties) Act 1999 (or any amendment or re-enactment thereof).

37. Notices

37.1 Unless otherwise communicated to the Party in writing any notice to be given by either party to the other may be served by email, personal service or by post to the address of the other party that is the registered office or main place of business of the Contractor or if the Council, the Shirehall, Abbey Foregate, Shrewsbury SY2 6ND

37.2 A Notice sent by email shall be deemed to be received providing receipt is acknowledged and confirmed, Notice given by letter shall be deemed to have been served at the time at which the letter was delivered personally or if sent by second class post shall be deemed to have been delivered in the ordinary course of post and if by first class post shall be deemed to have been delivered 48 hours after posting and acknowledged

38. Termination

38.1 Either Party may terminate this Agreement by giving to the other Party at least one month's notice in writing.

38.2 Either Party may terminate this Agreement by notice in writing to the other if:

38.2.1 the other Party commits a material breach of this Agreement and, in the case of a breach capable of being remedied, fails to remedy it within 14 calendar days of being given notice in writing setting out the breach and indicating that failure to remedy the breach may result in termination of this Agreement.

38.2.2 the other Party commits a series of minor breaches which, when taken together, amount to a material breach;

38.2.3 the other Party commits a material breach of this Agreement which cannot be remedied under any circumstances;

38.2.4 The Council may terminate this Agreement forthwith by notice where the Contractor commits a material breach as a result of a failure to comply with a non-compliance notice issued in accordance with clause 28 (Non-Compliance).

38.2.5 the other Party passes a resolution for winding up (other than for the purpose of solvent amalgamation or reconstruction), or a court of competent jurisdiction makes an order to that effect;

38.2.6 the other Party ceases to carry on its business or substantially the whole of its business; or

38.2.7 the other Party is declared insolvent, or convenes a meeting of or makes or proposes to make any arrangement or composition with its creditors; or a liquidator, receiver, administrative receiver, manager, trustee or similar officer is appointed over any of its assets.

38.3 Where notice to terminate is given pursuant to this clause 38, this Agreement shall terminate with effect on the date specified in the notice

39. Consequences of Termination

- 39.1** Other than as set out in this Agreement, neither Party shall have any further obligations to the other under this Agreement after its termination
- 39.2** Any provision of this Agreement which expressly or by implication is intended to come into or continue in force on or after termination of this Agreement shall remain in full force and effect
- 39.3** Termination of this Agreement, for any reason, shall not affect the accrued rights, remedies obligations or liabilities of the Parties existing at termination
- 39.4** Notwithstanding its obligations in this clause 39, if a Party is required by law, regulation, or government or regulatory body to retain any documents or materials containing the other Party's Confidential Information, it shall notify the other Party in writing of such retention, giving details of the documents and/or materials it must retain.
- 39.5** upon termination of this Agreement for any reason, the Contractor shall, at its own cost, deliver, and require that its employees, agents and sub-contractors deliver, to the Council all Project Materials ,information and any other property of the Council which are in the possession or control of the Contractor or the Contractor's employees, agents or Sub-Contractors at the date of termination.

40. Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE)

The Parties agree that the provisions of Schedule 4 shall apply to any Relevant Transfer of staff under this Agreement

41. Staffing Security – NOT USED

42. Security Requirements – NOT USED

43. Governing Law And Jurisdiction

It is the responsibility of the Contractor to comply with all relevant European and English legislation. This Agreement shall be governed by and construed in accordance with English law and the parties agree to submit to the exclusive jurisdiction of the English Courts

44. Severance

If any provision of this Agreement prohibited by law or judged by any court of

competent jurisdiction to be unlawful, void, invalid or unenforceable, the provision shall, to the extent required, be severed from this Agreement and rendered ineffective as far as possible without modifying the remaining provisions of this Agreement and shall not in any way affect any other circumstances of or the validity or enforcement of this Agreement.

45. Parent Company Guarantee⁷ – NOT USED

It is a condition of this Agreement that if the Contractor is a subsidiary company then its Ultimate Group/Holding Company must guarantee the performance of this contract and provide a letter to that effect signed by a duly authorised signatory of the Ultimate Group/Holding Company.

46. Amendments

This Agreement may only be amended in writing signed by duly authorised representatives of the Parties.

47. Agency, Partnership etc

This Agreement shall not constitute or imply any partnership, joint venture, agency, fiduciary relationship or other relationship between the Parties other than the contractual relationship expressly provided for in this Agreement. Neither Party shall have, nor represent that it has, any authority to make any commitments on the other Party's behalf.

48. Conflict of Terms

If there is any ambiguity or inconsistency in or between the Contract Documents the Council shall determine, at its sole discretion, the priority of the documents.

49. Entire Agreement

This Agreement contains the entire agreement between the Parties relating to the subject matter and supersedes any previous agreements, arrangements, undertakings or proposals, oral or written.

⁷ Delete this clause if no parent company guarantee is required. Replace text highlighted in green with words "not used"

IN WITNESS of this Agreement

Signed by and on behalf of

Shropshire Council

..... Interim Assistant Director of Legal &
Democratic Services

..... Legal Services Manager

Signed by and on behalf of

(Contractor)⁸

.....
Signature of authorised signatory Position in Company

Or

.....
Director Director/Company Secretary

Print Name (s).....

.....
⁸ Insert the contractors name

SCHEDULE 1

SPECIFICATION



RMCB 040

PPM/SC/EX09/2021

CONTRACT SPECIFICATION

DOCUMENT

MAINTENANCE AND REPAIR OF

ASSISTED LIVING EQUIPMENT

Version	Changes	Author
1.0	Aligned terminology with Legal Services	Nathan Davies

Prepared by: Nathan Davies
Shropshire Council
Property Services Group
January 2022

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1. GENERAL CONDITIONS

1.1 Definitions

The following definitions are in addition to the definitions contained in the main body of this Agreement:

The following definitions are in addition to the definitions contained in the main body of this Agreement:

“Budget Holder”: refers to the person/s responsible for the individual budget assigned to each Property. The Council has delegated responsibility for most of the Properties covered under the scope of this Agreement, however it remains the Contractors responsibility to determine the individual arrangements for each Property.

“Building Manager”: refers to the point of contact for the Property.

“Contract Administrator”: means the officer appointed by the Council to manage the contract evidenced by this Agreement

“Contract”: means the contract evidenced by this Agreement

“Contractor’s Base”: refers to the Contactor’s operational company address from which the works will be executed from.

“COSHH”: means the Control of Substances Hazardous to Health.

“Method Statement” refers to the health and safety document which identifies potential hazards that may arise during a particular task and outline the necessary precautions to be taken and which describes in a logical sequence exactly how a job is to be carried out in a way that secures health and safety and includes all the control measures required.

“Normal Working Hours”: are defined as being between 08:00 and 17:00 Monday to Friday excluding any bank holidays

“Out of Hours”: refers to beyond the Normal Working Hours of Monday to Friday 08:00 to 17:00.

“Performance Monitoring System”: means the RAG system adopted by the Council as more particularly described in this Specification and clause 28 of this Agreement

“Property” and **“Properties”**: refers to the sites listed in Schedule 3 at which the Services shall be delivered and within the context of this Specification means in each case the entire premises where the inspection or repair work is to take place. This also covers the externals and roof of the Property or Properties.

“RAMS”: means Risk Assessment and Method Statement.

“Service Personnel” refers to the Contractor's staff undertaking the Services on site

“Skilled Person” refers to a person who possesses, as appropriate to the nature of the works to be undertaken, adequate education, training and practical skill, and who is able to perceive risks and avoid hazards involved in the delivery of the works encompassed by this Contract.

1.2 General Contract Performance

The Council will operate a Performance Monitoring System for the Contractor working under this contract as referred to in clause 28 of this Agreement, to enable the monitoring of the Contractor's performance in respect of its obligations with regard to performance, price and quality.

The system will be a RAG (Red, Amber, and Green) traffic light system for any works done under the scope of the contract, this is also to include day works. Where the Contractor performs adequately and in accordance with the Council's requirements it will be recorded as 'Green', the Contractor will start with a Green status by default.

The monitoring areas will generally be, but are not restricted to:

1. Health and Safety/Insurance
2. Quality of Workmanship
3. Programme
4. Cost
5. Attendance

Examples of issues that could lead to an Improvement, Registration of Concern or Warning Notice being raised are repeated instances of:- H & S lapses on sites, Failures to produce timely H & S Plans/Manuals, unacceptable work, poor workmanship, use of non-specified materials without authorisation, inadequate control of sub-contractors, lack of adequate services commissioning, insufficient provision of resources, inadequate

programming, failure to adhere to timescales/sectional completions, failure to provide financial information, untimely provision of final accounts.

A rating status can be notified at any time during the project, but one will be recorded as a minimum at Practical Completion (if it is an Amber or Red, otherwise a Green will be assumed).

The system process steps are as set out in clause 28 of this Agreement.

Under exceptional circumstances an issue may be notified and recorded which would warrant an immediate "Red" notification being issued, similarly two notifications in the same monitoring area can result in the same action.

The RAG system will form part of the feedback process that will provide input into the Council's Key Performance Indicator system (KPI) together with Council Satisfaction feedback and Contract Administrator/Employers Agent evaluation.

1.3 General

The Contractor shall provide the Council with information to allow the Council to assess the competency of the Contractor and individual personnel carrying out the Services. This shall include as a minimum requirement the names of the specific persons who may carry out the work. It shall also include details of the quality system operated by the Contractor.

The Contractor will obtain agreement from the Council before substituting alternative Contractor Personnel before or during the Contract.

The Contractor shall provide a Method Statement for the work to be undertaken.

All work and procedures must adhere to relevant regulations, statutes and codes of practice.

The Contractor must comply with the Council's or relevant client property Health & Safety Policy. Failure to do so may result in immediate expulsion of the Contractor Personnel from site.

All hazardous or inflammable materials brought onto site must be notified to the Council in compliance with the 'Control of Substances Hazardous to Health Regulations, 2002'. All hazardous waste generated during sampling must be removed from site by the Contractor in compliance with the 'Health and Safety at Work etc. Act 1974'.

All work and procedures shall be undertaken with due care to avoid damage to the contents and fabric of a Property

Results of the outcome of the Services may only be divulged to the Council's representative and other persons nominated by the Council.

1.4 Important Notes

The Contractor shall be responsible for visiting each Property to take its own measurements, site surveys, necessary particulars, assessing any difficulties in gaining access and shall make arrangements with each Property manager for gaining access to the relevant areas. Damage caused to any Property by the Contractor in gaining access to it or as a consequence of carrying out the Services shall be made good at the Contractor's own expense to the satisfaction of the Council and where applicable (if a Property is not under the control of the Council) the relevant Property site manager.

The Contractor shall have the means to comply with the terms of the Contract, bearing in mind that the equipment within each Property will be of a differing manufacture.

The Contractor shall ensure that its Contractor Personnel shall carry a range of tools, suitable access equipment, equipment access keys, calibrated test instruments and any other necessary equipment to perform the Contractor's duties under this contract satisfactorily.

The Contractor shall provide supervisory staff to regularly monitor the performance and quality of the work of its Contractor Personnel.

The Contractor shall ensure that its Contractor Personnel are made aware that they must report to the main office of a Property or main reception whenever they are visiting a site to 'book-in', and must ensure that they 'book-out' when leaving a site on all occasions.

Asbestos Management Regulation –

The Contractor shall be aware that there is a mandatory requirement to read and sign the on-site Asbestos Register prior to the commencement of any work. All Contractor Personnel delivering the Services must be in possession of valid asbestos awareness training and copies of such training records must be submitted to the Council in advance of any work commencing on site at the Properties. The Contractor and its Service Personnel shall exercise extreme caution and remain vigilant when working on equipment, as existing asbestos inspection reports may not always reveal the presence of asbestos in internal units

The Contractor must ensure that all of its Contractor Personnel exercise politeness, confidentiality and discretion during the course of carrying out the Services and behave in a responsible and respectful manner to all employees of the Properties or any persons attending the Properties. The Contractor Personnel and Service Personnel shall wear suitable, respectable clothing and identity passes at all times.

The Services will be delivered on active sites and as such the normal operation of the site(s) shall not be interfered with by the Contractor and/or its Contractor Personnel. It is imperative that the Contractor shall at all times co-operate and liaise with the site manager of any Property about intended work schedules and limitations of access.

1.5 Hours of Work

The Contractor shall not charge any Out of Hours rates to the Council for the delivery of Services where it has been notified in advance that the Services are required to be delivered to Properties outside of the defined Normal Working Hours

1.6 Identity Passes

The Contractor shall ensure that all of its Contractor Personnel shall, at the Contractor's own expense, be provided with identification passes which meet the minimum acceptable standards of the Council. The identification passes shall contain:

- i) a current photograph of the wearer together with his/her name; and
- ii) the name of the company employing the wearer; and
- iii) bearing an authorisation signature, provided by a senior manager/director of the wearer's employer; and
- iv) the wearer's DBS number

The identity passes shall be encapsulated for protection and be available for inspection by Property staff or representatives of the Council, at any time while the Contractor Personnel are on site.

1.7 General Health and Safety

Each working area of a Property shall be kept free of any litter or debris. The Contractor shall ensure that all public areas and pathways are left clear and free from hazards at all times and shall leave each Property clean and tidy on completion of the Services.

The Contractor shall provide its own suitable first aid facilities on site.

The Contractor shall ensure that all Contractor Personnel are provided with, and instructed to wear, proprietary personal protective equipment (PPE) where and whenever there is considered a potential risk of injury as deemed necessary by a Risk Assessment/Method Statement.

The Contractor shall at all time adopt the working practices as defined in the RAMS.

1.8 Covid-19

The Contractor must provide a written risk assessment in relation to Covid-19 detailing all safety measures in place.

The Contractor must adhere to all H&S Covid-19 measures in place at each Property adhering to social distancing measures at all times where possible. If a face covering or PPE must be worn the Contractor must provide these to their Service Personnel at no cost to the Council along with hand sanitisers and disinfectant wipes.

The Contractor must ensure that their Contractor Personnel do not attend a Property if they are feeling unwell, have a temperature, cough or are showing signs of Covid-19

1.9 Legislation

The Contractor shall adhere to the following legislation (as a minimum) while carrying out the Services::

- The Health and Safety at Work Act 1974 (HASAWA)
- Workplace (Health, Safety and Welfare) Regulations 1992 (WHSWR)
- Management of Health & Safety at Work Regulations 1999 (MHSWR)
- Construction and Design Management Regulations 2015 (CDM)
- Lifting Operations & Lifting Equipment Regulations 1998 (LOLER)

- Personal Protective Equipment at Work Regulations 1992
- Personal Protective Equipment Regulations 2002
- Health and Safety (First Aid) Regulations 1981
- Control of Substances Hazardous to Health Regulations 2002 (COSHH)
- Electricity at Work Regulations 1989
- Regulatory Reform (Fire Safety) Order 2005 (RRFSO)
- Reporting of Injuries, Diseases & Dangerous Occurrences Regulations 2013
- Manual Handling Operations Regulations 1992
- Provision & Use of Work Equipment Regulations 1998 (PUWER)
- Control of Noise at Work Regulations 2005
- Environmental Protection Act 1990
- The Control of pollution Act 1989
- Confined Space Regulations 1997
- Working at Height Regulations 2005 (WAHR)
- The Control of Asbestos Regulations 2012
- F-Gas Regulations 2015
- Regulatory Reform (Fire Safety) Order 2005 (RRO)

This is not a complete list of the relevant legislation and is presented only as a guide to assist the Contractor.

1.10 Risk Assessments and Method Statements

The Contractor shall carry out a detailed and recorded "Risk Assessment" and 'Method Statement' for the works.

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The Contractor's risk assessment shall identify what measures the Contractor needs to take to comply with the requirements and obligations imposed by the above-mentioned Health and Safety legislation. The Contractor shall provide a Method Statement with regard to:

- i) its means of access to allow for inspection and testing;
- ii) sequence and method of work; and
- iii) how it will deal with hazardous operations; and
- iv) for the following works;

Demolition

Steel erection

Entry into confined spaces

Handling and removal of asbestos

Use of explosives (including cartridge tools)

Roof works and other overhead work

Contaminated sites or buildings

Other high risk activities may also require a Permit to Work

In many instances method statements can form the control measures required by risk assessment and the document can be accepted as such.

All works forming part of the Services shall be carried out in strict accordance with the requirements of "The Work at Height Regulations 2005.

The Contractor shall ensure that all Contractor Personnel are suitably trained and experienced and competent to work at height.

The Contractor must include COVID19 measures and submit RAMS for each Property on the Schedule of Properties - Schedule 2

1.11 Construction Phase Health and Safety Plan (CPP)

The Contractor shall provide a sufficiently detailed CPP that will demonstrate how the servicing element of the Contract will be managed safely across all Properties encompassed by the contract. Individual CPPs will not normally be required where the delivery of Services is to be undertaken at more than one location

For all works that fall under the scope of Construction (i.e. outside of servicing), as defined under the CDM regulations, the Contractor shall ensure that a specific CPP is available on site and reflects the safety arrangements relevant to that site. For example, protection of the public, exposure to asbestos, electricity and confined spaces, etc.

In addition, suitably developed RAMS will routinely be required for the servicing element and any additional works identified by servicing. These will be available on site.

1.12 Control of Substances Hazardous To Health

All chemicals to be used as part of the servicing and cleaning process of the delivery of the Services shall be advised to the Contract Administrator complete with all relevant COSHH Assessments and copies of the manufacturers Hazard Data Sheets for prior approval.

1.13 Data Protection

In addition to clause 18 of this Agreement, the Contractor shall:

- 1) adopt the British Standard for the secure destruction of confidential material (BS EN 15713:2009) applies to confidential information in all its forms. It requires companies to dispose of confidential information by shredding or disintegration. Confidential materials include paper records, computer hard drives and CDs/DVDs.
- 2) comply with BS EN 15713:2009 when transporting, storing and destroying documents.
- 3) Upon receipt of at least 7 days' notice, allow access to any relevant premises owned or controlled by the Contractor to inspect its data protection procedures and will, on the Council's request, prepare a report to the Council as to the Contractor's current technical and organisational measures used to protect any Personal Data.

1.14 Business Continuity

The Contractor shall have fully considered Business Continuity arrangements and shall develop robust Business Continuity Plans to minimise any effects on the delivery of the Services in the event that the Contractor's resources or operations be compromised as a result of an unplanned or Force Majeure Event as described in clause 35 of this Agreement. The Contractor shall make available upon request for inspection its Business Continuity plans which, as a minimum, shall detail contingencies in the event of the loss of or reduction in, its staff, office facilities or IT infrastructure and craft operatives and/or sub-contractors and shall also give consideration to its supply chain management.

1.15 Access to Plant and Equipment

The Contractor shall supply all suitable equipment, including ladders, platforms, MEWPs and mobile units etc., to gain access to all plant & equipment at each of the Properties at its own cost.

The Contractor shall ensure that their Contractor Personnel are fully trained and competent to use the access equipment needed and used to safely access areas required.

The Agreed Prices shall include any costs that may be incurred by the Contractor as a consequence of moving stored items to allow access to plant together with any subsequent reinstatement costs and no extra charges will be made to the Council for this expenditure.

1.16 Transport

The Agreed Prices shall be deemed to include all transport and mileage costs for Contractor Personnel delivering Services

1.17 Recalls

Where the Council's Contract Administrator, following an inspection and test of the works and at its sole discretion, deems it necessary for the Contractor to repeat the Services, the Contractor shall ensure that it returns to the applicable Property to undertake the requested works within 28 days of being requested to do so at its own expense

1.18 Hazardous Situations

The Contractor shall notify the Contract Administrator's attention by telephone on Shrewsbury (01743 281079) in the event that a hazardous situation occurs or is likely to occur to the occupants of any Property.

1.19 Additions / Deletions of Properties

The Council may, during the Term, wish to add or delete Properties from Schedule 3 - Properties. Any such additions or deletions shall be effected by giving the Contractor one month's notice in writing and shall be effected without penalty to the Council. The floor area of a Property, if given, may also alter due to building or demolitions.

Any such additions must be charged at the Agreed Prices.

1.20 Contract Adjustments

For the purpose of additions and deletions of Properties, the amounts payable shall be adjusted by the Agreed Prices.

1.21 Authorisation of Work

All work to be carried out by the Contractor beyond the scope of this Specification and Appendix A (Servicing Schedule) shall be authorised in advance by the Council and Budget Holder before the work is undertaken.

The Council reserves the right to seek competitive alternative quotations for any works that fall outside the scope of this Agreement

1.22 Inspection of Work

The Contractor shall be required from time to time to partially dismantle and re-assemble any items of equipment upon request, as far as is reasonably practicable, to demonstrate the nature of the servicing work carried out and that the Services have been completed in accordance with the manufacturers and Council requirements. This is to include making available any faulty items or items replaced for inspection indicating the nature of the fault. No costs shall be incurred to the Council for this element of the Contract.

1.23 Service Routines and Frequency

The service routines outlined in the Servicing Schedule (Schedule 2 to this Agreement) are to be read in conjunction with British Standards and industry guidelines. These defined routines prescribe the base standard and shall not preclude any requirements of relevant legislation, regulations, guidance and manufactures instructions

The Contractor shall update the logbook on site upon completion of each breakdown and service.

1.24 Site Protection

The Contractor shall be responsible for the protection of the site, the works and the public against all theft, damage or injury and shall allow for all necessary watching and lighting for the security of the works and protection of the public at each Property where it undertakes the Services.

The Contractor shall also erect and maintain any necessary temporary barriers or other means to protect and prevent accidental or unauthorised approach to potentially hazardous areas, such as incomplete plant or partially dismantled work platforms, unfenced drops, treated floor areas, hot or chemical processes etc. and remove on completion.

1.25 Delegation

The Contractor shall not delegate performance of the whole or any part of this contract to any person or company unless they have obtained the written permission of the Council.

Where permitted, delegation shall only be to another contractor on the Councils approved list and may only be on a short-term basis and in no circumstances shall it constitute more than 10% of the total scheduled contract works.

1.26 Items under warranty

If during the course of the delivery of the Services at a Property, the Contractors inspection of the Property, reveals items of new plant defective or incorrectly installed, the Contractor shall notify the Council as soon as reasonably practicable to enable the Council to advise the original installing contractor and to request that such defects be rectified under warranty.

1.27 Electrical Works

Any electrical work or work servicing and repairing electrical controls, components and wiring, shall be carried out by a Skilled Person in a manner to comply with B.S. 7671 Requirements for Electrical Installations – IEE wiring regulations as amended to date and BS5839-1 as amended to date.

All electrical works shall be in accordance with Shropshire Councils Standard Electrical Specification SP(E).

1.28 Workmanship Standards

All works executed under this contract shall be to standard expected by skilled person. The Council reserves the right to reject work at the Contractor's expense if the Council

2. SPECIFIC REQUIREMENTS

2.1 Scope of Contract

The delivery of the works undertaken by the Contractor under this Contract shall enable the Council to discharge their responsibility of the inspection, testing, certification and

repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

Lifts, ceiling track hoists, bath and stretchers complying with:

- 1) BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures.
- 2) BS 5965:1980 Specification for manually driven balanced personal home lifts.
- 3) BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification.
- 4) BS5776:1996 Specification for powered stairlifts
- 5) Definitions as given in BS EN 13015 Maintenance for lifts and escalators

All work must comply with BS7255:2012 code of practice for Safe Working on Lifts and BS EN ISO 10535:2006 Hoists for the transfer of disabled persons.

These visits are to be within the months shown in the schedule of properties – Schedule 3 and shall not lapse the date given. Inspections are permitted to be undertaken up to 2 weeks early.

The Contract shall comprise of the remedial works required to repair the existing equipment if found to be faulty **subject to the prior approval of the Budget Holder and Council** and shall be in accordance with paragraph 2.10 below

2.2 Agreed Prices

The Agreed Prices shall remain valid for the Initial Term of the Agreement. Thereafter the Contractor shall be entitled to submit a cost adjustment to the tendered figure on an annual basis that is in line with the Retail Price Index, and which is subject to the approval by the Council. The Council reserves the right to negotiate with the Contractor any proposed annual increase to its rates if in the Council's opinion the proposed increases are not justified.

The Council is entitled during the Term to amend the content of the scope of works, so as to encompass any regulatory or legislative changes that impact upon the items of Assisted Living Equipment covered under the scope of this Contract.

Call Out Unit Cost

The fixed rates charged are to account for traveling to and from site, including any mileage costs, in addition to the first hour on site. These rates shall be fixed in accordance with this paragraph 2.2

The number of Call Out unit costs charged to each breakdown call shall be kept to a minimum by ensuring that relevant spares are carried by Contractor Personnel attending site.

Obtaining materials

No costs shall be charged for the time taken to obtain materials, with the exception of emergency repairs.

2.3 Programme of Work:

The repair and maintenance of Assisted Living Equipment inspection shall be undertaken simultaneously. The visits shall be undertaken on the dates shown in the schedule of properties – Schedule 3 to this Agreement.

The Contractor shall ensure that it adopts a flexible approach to the delivery of the Services to accommodate the requirements of the households/Properties to be serviced as a majority of schools, private homes and some Council buildings will require 05:30 or 06:00 am starts or after 5pm/Saturday access. Please note there will be no additional costs applicable to the Council for Out of Hours working.

2.3.1 Logbook

The Contractor shall provide a service logbook to remain at each Property at no extra cost to the Council and shall supply a typed report of each service carried out in accordance with the requirements set out in paragraph 3.1 (Service Reports) below

2.4 Schedule of Properties

An indicative schedule of properties – Schedule 3 is annexed to this Agreement and shall be reviewed prior to the Commencement Date and re-issued annually to the Contractor during the Term of this Agreement.

2.5 Access

The Contractor shall make access arrangements at least two working weeks in advance with the Building Manager/Householder of each Property, giving notification that access to the Property is required and to ensure that access will be available for the time required to undertake the Services. The Building Manager/Householder shall be advised that access will be required to all rooms and areas containing Stairlifts, Hoists, Bath lifts, Bath hoists, Changing beds and Stretchers.

The Contractor shall make access arrangements for all breakdown / repair calls they receive with the Property before attending site to ensure access can be granted. Failure to comply with this requirement shall result in the non-payment of abortive visit charges. The Contractor shall keep a record of the arrangements made and with whom to enable the Council to agree payment of abortive visit charges. Other than emergency call-outs, all work referred to in this Specification shall be carried out during Normal Working Hours unless local arrangements are made. Such local arrangements shall not incur Out of Hours payments or additional costs to the Council.

Please note that access for School properties will not be available during term time between the hours of 9am – 3.30 pm.

2.6 Service Vehicle Equipment List

The following equipment shall be carried as a minimum requirement for servicing and breakdowns:

- i) 2 x Replacement hoist straps.
- ii) 2 x Stairlift remote controls.
- iii) Control cabling.
- iv) Replacement fuses.

2.7 Abortive Visit Charges

In line with the requirements of paragraph 2.5 of this Specification, abortive visits shall only be charged in line with the Agreed Prices and shall normally consist of a Call Out unit cost.

2.8 Spare Parts and Renewals

Rectification of highlighted defects shall only be undertaken in accordance with this paragraph 2.8

The Contractor shall use only new genuine manufacturer's spares, except where otherwise directed, with all removed equipment to be removed from site and correctly disposed of at the Contractor's expense in line with relevant legislation. Reconditioned parts are not acceptable, except in circumstances where it is no longer possible to obtain equivalent new parts.

Random checks of replaced parts may be carried out by the Council. The Contractor shall reimburse the Council for any parts that are found to have been changed or replaced without good reason.

The Council reserves the right to request copies of supplier's invoices to verify cost mark-up against trade price of materials used against the values stated in the Tender.

Contractor's vehicles at the start of each day shall carry replacement parts as shown in the schedule of spare parts in section 2.6

The Contractor shall ensure that it sources all materials at the most competitive rates currently available to ensure best value at all times.

All replacement materials fitted shall be on a like for like basis if still available. Where materials are no longer obtainable, replacements shall match the original performance of the parts replaced to ensure the original design remains valid.

2.9 Live Working

A robust safe system of works shall be adopted at all times, as defined in produced RAMS, to minimise the dangers of any live working required during the delivery of the Services

The guidance contained within "Electricity at work Safe working practices" (HSG85) shall be adhered to at all times as a minimum.

2.10 Repairs at Time of Service

The Contractor shall, subject to obtaining Budget Holders permission, undertake remedial works to correct non-functioning equipment up to financial limit of £300.00 ("financial limit") at the time of a service visit. Repairs beyond this threshold will need to be subject to a written quotation as per clause 3.2. Any invoices received for repair works undertaken exceeding the threshold will be rejected and excess spend will not be paid.

Items of non-conformity to current standards shall not be undertaken at time of service and shall be subject to 3.2

3. SERVICE REPORTS

The Contract Administrator may, during the Term wish to amend the method of service reporting – i.e. uploading to the cloud. The Contractor agrees to comply with any revised method of reporting at no extra cost to the Council

3.1 Service Reports

The Contractor shall submit electronically within 7 days of the service a typed report containing the following information to the Contract Administrator:

1. Contractor's name and address and emergency contact details
2. Property/Client number
3. Property/Client name
4. Type of service i.e. quarterly or bi- annual annually
5. Date of service
6. Time arrived on site

7. Time departed site
8. Make and model of equipment
9. Equipment serial number
10. Equipment electrical load
11. Date of manufacture
12. Statement on the general condition of the equipment
13. Supply cable size and type
14. Results of the electrical tests performed as per the requirements of the Servicing Schedule – Appendix A.
15. Defects found - a quotation for rectification must accompany the service report
16. Defects corrected
17. Speed of operation of R.C.D. at 100% and 500% rating
18. Signature of service engineer
19. Signature of a Responsible Officer on site
20. Logbook present and updated.

Hand-written reports will not be accepted

3.1.1 Repair Works

For all repair works executed, the Contractor shall submit with its invoice a worksheet detailing the works undertaken, accompanied with any required report forms as recommended in the relevant British Standards: i.e., Modification Certificate from BS5839-6:2019+A1:2020; Minor Works Certificate from BS7671:2018+A1:2020; this is not an exhaustive list.

3.2 Quotations

For all works that fall out the scope of Service – i.e., repairs required, and are not undertaken at the time of service (subject to the requirements of 1.22 and 2.10), the Contractor shall submit with its service reports an itemised quotation.

The quotation must include a full breakdown of costs, showing individual costs for materials and labour, to enable the quotation to be fully evaluated.

Subject to Budget Holder approval, the Council will issue the Contractor with an official order number to proceed if deemed necessary.

The Contractor shall use the agreed day rates when preparing quotations to ensure best value to the Council and to enable procurement without seeking alternative quotations.

Notwithstanding the above, the Council reserves the right to seek alternative quotations to monitor the Contractor's performance and competitiveness. The Council reserves the right to place orders with other suppliers for repair works if their quotations are deemed to offer preferential rates.

4. INVOICES & PAYMENT

Payment of Valid Invoices shall be made in accordance with clause 9 of this Agreement and as follows: Payment of invoices will be made in arrears following the submission of the electronic service report and invoice per property.

Payment will be made following the electronic submission of an invoice, on completion of the works and must be presented within 14 days following completion of works.

All Service invoices are to be upload per Property onto TF Cloud by the Contractor.

5. KEY PERFORMANCE INDICATORS

The Council shall monitor the performance of the Contractor's delivery of the Contract. The Contractor shall meet the following targets on delivery:

Item to be monitored	Target to be met
Adherence to schedule of delivery	95%
Reports received within 7 days of inspection	95%
Invoices received within 14 days of inspection	95%
Accuracy of report documentation	95%
Breakdown calls resolved on first repair visit	80%
Breakdown calls not resolved on first repair visit are done so with three working days following initial call.	95%
Breakdown calls not resolved on first repair visit are done so with five working days following initial call. Note, major replacement works are excluded from this requirement.	100%
Meeting required response times for non-urgent breakdown calls	95%
Meeting required response times for urgent breakdown calls	95%
Avoidance of repeated call outs to faults of the same nature to the same system within 1 month of visit	95%

The Council shall issue the Contractor, each calendar month, a report to highlight any overdue inspections based upon the Schedule of Properties – Schedule 2 document.

Failure to achieve the required targets shall result in the Council evoking the procedures laid down in section 1.3

6. INSPECTION PROCEDURES

The Services shall be carried out in accordance with the relevant British Standards and industry guidance.

The requirements of the inspection regime are detailed in the Servicing Schedule – Schedule 2 to this Agreement. The Servicing Schedule prescribes the base standard and shall not preclude any additional requirements of relevant legislation, regulations, guidance and manufactures instructions. Where relevant legislation, regulations, guidance and manufactures instructions are more onerous, they shall be adhered to at no extra cost to the Council.

7. CALL OUTS AND EMERGENCY REPAIRS

The Contractor shall be required to provide a 24 hour 365 day per year emergency breakdown service. Answer phone services are not acceptable.

The Contractor shall be able to respond to instructions to attend an emergency breakdown by attending a site within **two hours** from the receipt of a request from the Council.

Breakdowns shall be given priority over planned service visits and must be completed within 24 hours from receipt of a request from the Council, unless otherwise agreed with the Council.

For breakdowns reported during Normal Working Hours the Contractor will be issued verbally with an order number, followed by an official order via email within a 3 Working Days.

For breakdowns reported Out of Hours the Contractor shall obtain an order number from the Council on the next Working Day.

The charges and rates for breakdowns and emergency breakdowns i.e., labour rates, materials and travelling rates, together with any special conditions, shall be as agreed in the Agreed Prices.

The Contractor shall provide details of its Out of Hours Contract Personnel engaged to be available for the Out of Hours breakdown service. The details to be provided shall include names & contact numbers and shall be available at the Commencement Date. The Contractor shall update such details to reflect any revisions immediately following any such revisions. The Contractor shall also re-confirm the contact details prior to each annual extension of this Agreement and prior to times of public holidays e.g. Easter, Christmas etc.

In the event of an Out of Hours call-out, the Contractor shall report to the person in charge of a Property to advise if they are unable to complete a repair and inform that person of the course of action that will be taken to remedy the situation i.e. obtaining replacement parts.

In the event of spares/parts not being available from stock or local suppliers the Contractor shall arrange for overnight delivery direct from the manufacturer to its agents.

Schedule 2

RMCB 040 - EX09 - MAINTENANCE & REPAIR OF ASSISTED LIVING EQUIPMENT {STAIRLIFTS, HOISTS BATHS & STRETCHERS} SERVICING SCHEDULE

The Contractor shall Follow these guidelines where applicable.

Item No.	Item	Action	Notes/Frequency	
SECTION 1 - GENERAL				
1.1	General-	6) Lifts, ceiling track hoists, bath and stretchers complying with: a) BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures. b) BS 5965:1980 Specification for manually driven balanced personal home lifts. c) BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification. d) BS5776:1996 Specification for powered stairlifts e) Definitions as given in BS EN 13015 Maintenance for lifts and escalators 7) All work must comply with BS7255:2012 code of practice for Safe Working on Lifts and BS EN ISO 10535:2006 Hoists for the transfer of disabled persons. 8) These visits are to be within the months shown in the Schedule of Properties – Schedule 2 and shall not lapse the		

		date given. Inspections are permitted to be undertaken up to 2 weeks early.		
1.2	Personal Competencies	1) The Contractor shall only employ Skilled Person's to undertake the delivery of this Contract. 2) The Service Personnel shall be qualified time served Engineers who have undertaken appropriate training and qualifications to cover the specialist knowledge required in servicing and specifying Assisted Living Specification document.	Original certificates shall be provided at the request of the authority. Copies of qualification shall form part of the tender submission.	
1.3	Test Instruments	1) The Contractor shall have at all times available to them the required test equipment as stipulated in the Specification Document.		
1.4	Reporting	1) The Contractor shall submit the service report containing the information detailed within the Specification document to the Client	To be submitted electronically.	
1.5	Documentation and Logbook	1)) Examine the logbook. Ensure that it contains commissioning data, information and instructions as specified in BS EN 81-40:2008. 2) Ensure notices are present, in good condition and clearly displayed. Such notices shall conform to the requirements of BS EN 81-40:2008. 3) Ensure that the operator has and understands the manufacturer's operating instructions. 4) Written instructions shall be present for: a) safe use of equipment. b) normal operating and breakdown of the equipment. c) the need to keep the written instructions and the emergency hand winding handle in a safe place together with any emergency telephone numbers.	Frequency 6 months. 1) Report, as a defect requiring attention, the absence of any such item within the logbook. 2) Provide new notices as necessary. 3) Provide laminated A4copies of instructions were missing.	

			4) Provide relevant contractors and administers contact details	
1.6	Electrical Power Supply	1) Carry out a periodic inspection with associated circuit tests in accordance with the requirements of BS7671:2018+A1:2020 Requirements for Electrical Installations. 2) Examine flexible cables for wear, fraying braid and brittle insulation, replace where necessary. 3) Test polarity, examine fuses, ensure correctly rated fuses are fitted. 4) Examine terminal connections 5) Inspect the fused connection unit or fused switch for damage. 6) Report if no R.C.D. fitted on lift with greater than 110V r.m.s. between cores or greater than 55V r.m.s. above or below earth within the trailing cable. 7) Test operation of R.C.D. at 50%, 100% and 500% of rating. Times of operation to be shown on report. 8) Examine chargers and low voltage wiring. Examine charging contacts in docking bays. Test operation and confirm that it is effectively indicated to the user when the stairlift is brought to rest out of reach of the charging contacts. 9) Test batteries; renew as necessary. Ensure batteries are correctly fitted. 10) Test earth continuity to all parts of the installation. 11) Examine earthing and bonding arrangements.	Frequency 12 months. 1) Minor works certification to be supplied with invoice	
SECTION 2 – INCLINED PLATFORM LIFT AND STAIR RISER				
2.1	Test Drive – General Operation	1) Check operation of the stair lift including all control buttons, displays and verify that the equipment is securely fixed. 2) Check the ride quality and for unusual noises that could indicate problems.	Frequency 6 months. 1) This test should be carried out with the power supply	

			connected and the fuse panel closed.	
2.2	Emergency Stop Button	1) Check the operation of the emergency stop push button on the stair lift [if fitted] - verify that the call is cancelled when the stop button is pushed.	Frequency 6 months. 1) This test should be carried out with the power supply connected and the fuse panel closed.	
2.3	Electrical safety circuits and isolators	1) Check the operation of the electrical safety circuits and the isolators. Ensure all connections are tight and check for any signs of heat damage or general damage.	1) This test should be carried out with the power supply connected and the fuse panel closed.	
2.4	Brakes	1) Check shoe linings for serviceability. 2) Check for correct operation when lift is working. 3) Lubricate and adjust as necessary. 4) Ensure linings and drum are free from oil or grease. 5) Check the operation of the driving unit and the brakes	Frequency 6 months 1) This test should be carried out with the power supply connected and the fuse panel closed.	
2.5	Safety gear	1) Check the operation of the devices for preventing free fall and descent with excessive speed (OSG & safety gear).	Frequency 6 months. 1) This test should be carried out with the power supply connected and the fuse panel closed.	
2.6	Alarm system (if fitted)	1) Check the status of the alarm battery and ensure that the audible alarm operates when the alarm push button is pressed on the control panel.	Frequency 6 months 1) This test should be carried out with the power supply	

		2) Check the operation of the alarm system (if fitted) and ensure that contact is made with the appropriate alarm centre, reception area or subscriber telephone.	connected and the fuse panel closed.	
2.7	Pressure sensitive areas or edges	1) Check the pressure sensitive areas or edges and ensure when pushed down that the stair lift stops immediately.	Frequency 6 months 1) This test should be carried out with the power supply connected and the fuse panel closed.	
2.8	Integrity check of rails, supports and suspension items.	1) Check the integrity of the rails, the supports and any suspension items used for lifting.	Frequency 6 months 1) With the stair lift parked at the lower landing, isolate the power supply at the main switch.	
2.9	Guides, guide shoes and rollers	1) Carry out a detailed inspection of the guides, guide shoes or rollers.	Frequency 6 months 1) With the stair lift parked at the lower landing, isolate the power supply at the main switch.	
2.10	Emergency arm release	1) Check the operation of the emergency arm release and manual lowering.	Frequency 6 months. 1) This test should be carried out with the power supply	

			connected and the fuse panel closed.	
2.11	Labelling	1) Check that the labelling is in place including the clearly marked SWL.	Frequency 6 months	
2.12	Batteries	1) Check for the operation of standby or traction batteries.	Frequency 6 months. 1) This test should be carried out with the power supply connected and the fuse panel closed.	
2.13	Motor	1) Clean down, wiping up all loose oil and note on report oil leaks. 2) Inspect oil in gear box and motors. Top-up if necessary. 3) Open end covers of motors and blow out all carbon dust on brush gear windings. 4) Inspect brush gear and replace where worn. 5) 5) On hydraulic lifts inspect ram and seals. Top-up reservoir if necessary.	Frequency 6 months.	
2.14	Carriage	1) Ride in car for full length of travel and observe for obstructions to the Carriage or User. 2) Check for correct linear speed. 3) Check operation doors and ramps. 4) Inspect and clean door runners. 5) Examine all chair and wall stations. Clean and adjust as necessary. Test operation. 6) Check operation of all sensitive edges and sensitive surfaces. 7) Check that pushes and switches operate and do not stick. 8) Check indicator lamps or neons operate and replace as necessary. 9) Examine and test operation of alarms (if fitted). 10) Clean and examine all upholstery. Repair any minor damage.	Frequency 6 months.	

2.15	Trailing Electric Power and Control Cables	1) Inspect full length of cables for deterioration. 2) Check operation of self-rewinding reel or drum, or similar tensioning device. 3) Check their anchorage's.	Frequency 6 months.	
2.16	Rails and Shaft	1) Clean and inspect rails for wear and deflection. 2) Check all fixings for security. 3) Inspect and check operation, settings and security of control and final limit switches. 4) Inspect shaft lining for damage. 5) Clean base of shaft.	Frequency 6 months.	
2.17	Hand Winding	1) Check that hand winding handle and brake release clamps are accessible and ready for use in an emergency.	Frequency 6 months.	
SECTION 3 – VERTICAL PLATFORM LIFTS				
3.1	Nut / Screw Lubrication	1) Check the level of oil in the lubrication reservoir and replenish if necessary, with the oil recommended by the manufacturer. 2) Clean any spilt lubricant.	Frequency 3 months. 1) These routines should be undertaken at periods considered necessary depending upon nature of use and operating conditions. 2) With the lift parked at the lower landing, isolate the power supply at the main switch in the fuse panel. 3) The power supply to the installation	

			must be isolated 20 minutes before any work is undertaken on the motor owing to capacitor discharge time of the frequency inverter (speed controller).	
3.2	Motor drive nut inspection	<ol style="list-style-type: none"> 1) Check the distance between the two motor drive nuts, using the manufacturers measurement tool provided. 2) If the tool cannot be inserted between the two nuts, this indicates that the nuts are excessively worn and must be replaced. 3) After the drive nut has been replaced, the distance between the two nuts should be adjusted as directed by the manufacturer's guidelines. 	<p>Frequency 3 months.</p> <ol style="list-style-type: none"> 1) These routines should be undertaken at periods considered necessary depending upon nature of use and operating conditions. 2) With the lift parked at the lower landing, isolate the power supply at the main switch in the fuse panel. 3) The power supply to the installation must be isolated 20 minutes before any work is undertaken on the motor owing to capacitor 	

			discharge time of the frequency inverter (speed controller).	
3.3	Control panel - when the platform is running	1) Check the control panel for any obvious faults such as severe burning of contacts.	Frequency 3 months.	
3.4	Drive unit 'free run' check	1) Operate the lift to a location approximately 500mm above the lower landing. 2) Operate the brake test button located in the main cabinet. The platform should not 'sink'. 3) Press the upper landing call push button to cause the platform to raise approximately 200-300mm, and release the button. The platform should stop and remain stationary. 4) Reset the brake test button. 5) If the lift does not meet the above performance, report.	Frequency 3 months. 1) When undertaking these routines it is imperative that all safety precautions are observed and fully complied with. 2) Before any person goes into the shaft to undertake a routine the platform must be raised and the pit prop must be raised and locked. 3) This pit prop can be extended when the platform is raised approximately 1 metre above the lower limit. It must be returned to its lowered position before the unit is returned to service.	

			4) Unless otherwise specified, isolate the power supply at the main switch in the fuse panel before undertaking service routines.	
3.5	Door locking bolts check	1. Check the proper operation of the door locking bolts; ensure that the bolts slide easily into place and do not permit excess movement of the door when in the locked position. 2. If necessary, adjust the electric striking plate.	Frequency 3 months. 1) With the lift parked at the lower landing, isolate the power supply and the main switch in the fuse panel.	
3.6	Frequency inverter (speed controller)	1) Check the condition and tightness of the connections to the unit. 2) Clean any dust or dirt off the unit.	Frequency 12 months. 1) The power supply to the installation must be isolated 20 minutes before any work is undertaken on the motor owing to capacitor discharge time of the frequency inverter (speed controller).	
3.7	Door openers	1. Check the condition and tightness of the connections to the unit.	Frequency 12 months.	

		2. Clean any dust or dirt off the unit.	1) The power supply to the installation must be isolated 20 minutes before any work is undertaken on the motor owing to capacitor discharge time of the frequency inverter (speed controller).	
3.8	Motor drive nut cleaning	1) Operate the Brake Test Button located in the main cabinet. 2) Check the distance between the two drive nuts. 3) Rotate the nuts clockwise until they release from the nut unit. Remove the nuts. 4) Separate the nuts and clean with a solvent. 5) Refit the nuts and torque tighten. Set the distance between the two nuts to that before they were removed for cleaning. 6) Reset the brake test button.	Frequency 24 months 1) These routines should be undertaken at periods considered necessary depending upon nature of use and operating conditions. 2) With the lift parked at the lower landing, isolate the power supply and the main switch in the fuse panel. 3) The power supply to the installation must be isolated 20 minutes before any	

			work is undertaken on the motor owing to capacitor discharge time of the frequency inverter (speed controller).	
3.9	Ropes and Cables	1) Inspect full length of ropes for splintering or wear. If no lubricant is apparent in the interstices between wires, apply a thin coating of a dressing recommended by the rope maker. 2) Inspect clean and lubricate if necessary full length of chains. 3) Check ropes or Chains for even tension. 4) 4) Check operation of slack chain or slack rope switch.	Frequency 6 months. 1) Report condition and next anticipated replacement.	
SECTION 4 – LIFTING SLINGS				
4.1	Inspection	1) Under LOLER, lifting equipment may also need to be inspected at suitable intervals between thorough examinations. This is usually where your risk assessment has identified a significant risk from the use of the equipment. 2) Lifting accessories such as chains or slings will not normally require an inspection as long as they receive a thorough examination at the appropriate interval and a proper pre-use check.	Frequency 6 months. 1) The person carrying out the inspections should not be the same person who performs the routine maintenance as this would mean they would be responsible for assessing their own work.	
4.2	Thorough examination and inspection	1) Accessories for lifting must be thoroughly examined either at least every 6 months or in accordance with an examination scheme.	Frequency 6 months. 1) You must keep records of all	

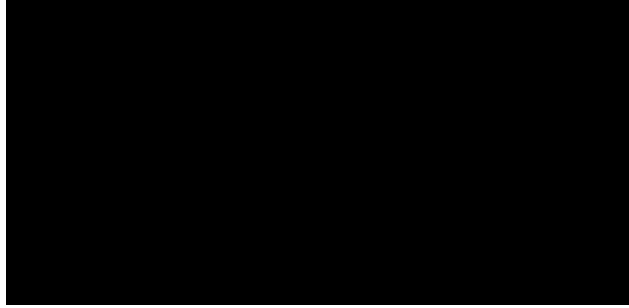
		2) Carry out a thorough examination and inspection of the lifting equipment. 3) The level of examination, and the requirement for testing, is based on an assessment of risk and determined by the competent person. 4) The competent person will determine the scope of the thorough examination and they may use a number of sources to help them do this, such as industry guidance.	thorough examinations and inspections for all your lifting equipment. Records for all lifting accessories must be kept for a minimum of 2 years.	
SECTION 5 – PATIENT / PERSONNEL LIFT (MOBILITY)				
5.1	Operation - General	1) Check with the operator to confirm that the machine is working correctly and find out if there have been any previous problems with the unit or its operation.	Frequency 6 months.	
5.2	Thorough examination	1) Carry out inspection in accordance with LOLER. The critical areas requiring particular attention are: 2) Visually check any supporting structure. 3) Visually check all bolted connections to ensure that they have not worked loose. 4) Ensure, where fitted, that all travel limit switches are functioning correctly and/or buffers are in place and free from damage or wear. 5) Visually check the travel mechanism and wheels, where fitted, to ensure that they are free from damage or wear. 6) Ensure that the hoisting medium (wire rope or chain) is of the size and type as specified in the hoist manufacturer's instructions and is reeved in accordance with those instructions. Pay particular attention to the end terminations. 7) Visually check all pulleys/sheaves and drums to ensure that they are free from damage or wear, that the hoist rope or chain fits correctly on them and that they are appropriately lubricated. Check that all idler pulleys/sheaves turn freely.	Frequency 6 months. 1) Patient/Personnel hoists are suitable for the lifting of persons so normally they would require a 6 monthly thorough examination. 2) However, in those circumstances where there is a high intensity of use, more frequent thorough	

		<p>Ensure that all appropriate guards are undamaged and are in place.</p> <p>8) Thoroughly examine the whole length of the hoist rope or chain for signs of wear, damage, broken wires and corrosion. Particular attention should be paid to those portions that regularly pass around pulleys/sheeves.</p> <p>9) Visually inspect the upper and lower, where fitted, hoist limits to ensure that they are in place and free from damage or excessive wear.</p> <p>10) Visually inspect the braking mechanism for wear, damage and adjustment in accordance with manufacturer's instructions.</p> <p>11) Where the hoist is controlled by hydraulics then all flexible hoses should be checked for damage and leakage.</p> <p>12) Hydraulic cylinders should be visually examined for leakage, corrosion on rods and alignment. Visually check end fixings for wear, security and lubrication.</p> <p>13) Boom arms and supports should be checked for damage, distortion and corrosion.</p> <p>14) Pivoting joints on boom arms and supports should be checked for wear, corrosion, security and evidence of lubrication.</p> <p>15) The controls should be visually checked for damage ensuring that all controls are marked to show their function and direction of movement.</p> <p>16) Pendant control cable, where fitted, should be visually checked for wear and damage and ensuring that any supporting wire rope is in good condition.</p> <p>17) The electrical power supply system to the hoist should be visually checked for damage and wear ensuring there is no access to live conductors.</p> <p>18) Carry out a functional test on the hoist ensuring that:</p> <ol style="list-style-type: none"> All movements operate freely. The hoist rope or chain moves freely round the pulley/sheaves and winds correctly and evenly onto the drum or into the bucket as appropriate. 	<p>examinations may be necessary.</p> <p>3) The ceiling hoist and any adjacent equipment likely to present a hazard to those involved in the thorough examinations should be taken out of service for the duration of the examination.</p> <p>4) The ceiling hoist should only be operated during that time under the direction and control of the competent person carrying out the examination.</p> <p>5) The examination should be carried out in a logical sequence to ensure that nothing is overlooked.</p> <p>6) Overload testing should be carried out in accordance with the manufacturer's</p>	
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		<ul style="list-style-type: none"> c) The hydraulic ram, boom and supports move freely without any erratic movement. d) All limiting devices operate correctly. 19) A visual check should be made to ensure that the hoist and any supporting runway is marked with its safe working load. 20) The means of attachment for any person lifting accessories to the hoist should be visually examined for damage and wear and the swivel should be moved to check that it moves freely. 21) Where the person lifting accessories are permanently attached to the hoist these accessories should be considered as an integral part of the hoist. <ul style="list-style-type: none"> a) However if these accessories hang on a hook then they should be treated as a separate item and examined as an accessory for lifting and subjected to at least 6 monthly thorough examinations. b) In such circumstances the hook and swivel should be visually examined for damage, wear and distortion, that the swivel rotates freely and that the hook should be fitted with a safety catch that is in good working order. 22) The permanently attached accessories should be visually examined for damage, wear and corrosion, paying particular attention to the attachment areas and ensuring that the accessories are marked with the safe working load. 23) Ensure that warning signs and other important manufacturer's instructions are present and readable e.g. rating plate. 	<p>instructions and current standards.</p> <p>7) Non-destructive testing may be considered necessary particularly when there is a suspicion of cracks or other damage being present in the structural parts e.g. the runway, the boom or supports.</p>	
5.3	Electrical	<ul style="list-style-type: none"> 1) Check main control switch contacts, check cable connections are tight and renew as necessary. 2) Check main electrical isolator for condition and operation. 	<p>4) Frequency 12 months</p>	

		3) Electrically inspect and test the equipment in accordance with the IET Code of Practice In-service Inspection and Testing of Electrical Equipment.		
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Schedule 3



SCHEDULE 4

TUPE AND PENSION CLAUSES

Section 1 EMPLOYMENT PROVISIONS

Unless otherwise stated in each Section, the following definitions shall apply:

Contractor Personnel: all directors, officers, employees, agents, consultants and contractors of the Contractor and/or any Sub-contractor engaged in the performance of the Contractor's obligations under this Contract;

Contractor's Final Personnel List: a list provided by the Contractor of all Contractor Personnel who will transfer under the Employment Regulations on the Service Transfer Date;

Contractor's Provisional Personnel List: a list prepared and updated by the Contractor of all Contractor Personnel who are engaged in or wholly or mainly assigned to the provision of the Services or any relevant part of the Services which it is envisaged as at the date of such list will no longer be provided by the Contractor and who are expected, if they remain in the employment of the Contractor or of any sub-contractor as the case may be until immediately before the termination date or the expiry date of the (as appropriate), would be Transferring Contractor Employees;

Data Protection Legislation means: all applicable data protection and privacy legislation in force from time to time in the UK including the retained EU law version of the General Data Protection Regulation ((EU) 2016/679) (UK GDPR); the Data Protection Act 2018 (DPA 2018) (and regulations made thereunder) and the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426) as amended and the guidance and codes of practice issued by the Information Commissioner or other relevant regulatory authority and applicable to a party

Direct Loss all damage, loss, liabilities, claims, actions, costs, expenses (including the cost of reasonably and necessarily incurred legal or professional services), proceedings, demands and charges whether arising under statute, contract or at common law but, to avoid doubt, excluding Indirect Losses;

Effective Date: the date(s) on which the Services (or any part of the Services), transfer from any Former Provider to the Contractor or Sub-Contractor, and a reference to the Effective Date shall be deemed to be the date on which the employees in question transferred or will transfer to the Contractor or Sub-Contractor.

Employee Liability Information: the information that a transferor is obliged to notify to a transferee under regulation 11 of the Employment Regulations :
(a) the identity and age of the employee;

- (b) the employee's written statement of employment particulars (as required under section 1 of the Employment Rights Act 1996);
- (c) information about any disciplinary action taken against the employee and any grievances raised by the employee, where a Code of Practice issued under Part IV of the Trade Union and Labour Relations (Consolidation) Act 1992 relating exclusively or primarily to the resolution of disputes applied, within the previous two years;
- (d) information about any court or tribunal case, claim or action either brought by the employee against the transferor within the previous two years or where the transferor has reasonable grounds to believe that such action may be brought against the Contractor arising out of the employee's employment with the transferor;
- (e) information about any collective agreement that will have effect after the Effective Date or the Service Transfer Date, as the case may be, in relation to the employee under regulation 5(a) of TUPE.

Employee Liabilities: all claims, actions, proceedings, orders, demands, complaints, investigations (save for any claims for personal injury which are covered by insurance) and any award, compensation, damages, tribunal awards, fine, loss, order, penalty, disbursement, payment made by way of settlement and costs, expenses and legal costs reasonably incurred in connection with a claim or investigation related to employment including in relation to the following:

- (a) redundancy payments including contractual or enhanced redundancy costs, termination costs and notice payments;
- (b) unfair, wrongful or constructive dismissal compensation;
- (c) compensation for discrimination on grounds of sex, race, disability, age, religion or belief, gender reassignment, marriage or civil partnership, pregnancy and maternity or sexual orientation or claims for equal pay;
- (d) compensation for less favourable treatment of part-time workers or fixed term employees;
- (e) outstanding employment debts and unlawful deduction of wages including any PAYE and national insurance contributions;
- (f) employment claims whether in tort, contract or statute or otherwise;
- (g) any investigation relating to employment matters by the Equality and Human Rights Commission or other enforcement, regulatory or supervisory body and of implementing any requirements which may arise from such investigation;

Employment Regulations: the Transfer of Undertakings (Protection of Employment) Regulations 2006 (SI 2006/246) as amended or replaced or any other regulations implementing the Acquired Rights Directive

Former Provider: a Contractor supplying services to the Council before the Service Transfer Date that are the same as or substantially similar to the Services (or any part of the Services) and shall include any sub-contractor of such Contractor (or any sub-contractor of any such sub-contractor);

Indirect Losses means loss of profits (other than profits directly and solely attributable to carrying on of the Business), loss of use, loss of production, increased operating costs, loss of business, loss of business opportunity, loss of

reputation or goodwill or any other consequential or indirect loss of any nature, whether arising in tort or on any other basis;

Notified Sub-contractor: a Sub-contractor identified in Annex D to whom Transferring Council Employees and/or Transferring Former Provider Employees will transfer on a Relevant Transfer Date;

Relevant Transfer: a transfer of employment to which the Employment Regulations applies;

Replacement Services: any services which are the same as or substantially similar to the Services and which the Council receives in substitution for any of the Services following the expiry or termination of Partial Termination of this Contract, whether those services are provided by the Council internally and/or by any third party;

Replacement Provider: any third party provider of Replacement Services appointed by the Council from time to time (or where the Council is providing replacement Services for its own account, the Council);

Replacement Sub-contractor: a sub-contractor of the Replacement Provider to whom Transferring Contractor Employees will transfer on a Service Transfer Date (or any sub-contractor of any such Sub-contractor);

Retendering Information: as defined in paragraph 6.10;

Service Transfer: any transfer of the Services (or any part of the Services), for whatever reason, from the Contractor or any Sub-contractor to a Replacement Provider or a Replacement Sub-contractor;

Service Transfer Date: the date on which the Services (or any part of the Services), transfer from the Contractor or Sub-Contractor to the Council or any Replacement Provider giving rise to a Relevant Transfer;

Staffing Information: in relation to all persons identified on the Contractor's Provisional Personnel List or Contractor's Final Personnel List, as the case may be, such information as the Council may reasonably request (subject to all applicable provisions of the Data Protection Legislation, but including in an anonymised format:

- (a) their ages, dates of commencement of employment or engagement and gender;
- (b) details of whether they are employed, self employed contractors or consultants, agency workers or otherwise;
- (c) the identity of the employer or relevant contracting Party;
- (d) their relevant contractual notice periods and any other terms relating to termination of employment, including redundancy procedures, and redundancy payments;
- (e) their wages, salaries and profit sharing arrangements as applicable;

- (f) details of other employment-related benefits, including (without limitation) medical insurance, life assurance, pension or other retirement benefit schemes, share option schemes and company car schedules applicable to them;
- (g) any outstanding or potential contractual, statutory or other liabilities in respect of such individuals (including in respect of personal injury claims);
- (h) details of any such individuals on long term sickness absence, parental leave, maternity leave or other authorised long term absence;
- (i) copies of all relevant documents and materials relating to such information, including copies of relevant contracts of employment (or relevant standard contracts if applied generally in respect of such employees); and
- (j) any other Employee Liability Information

Sub-Contractor: the contractors engaged by the Contractor to provide goods, services or works to, for or on behalf of the Contractor for the purposes of providing the Services to the Council.

Transferring Contractor Employees: those employees of the Contractor and/or the Contractor's Sub-contractors wholly or mainly engaged in the provision of the Services as the case may be as immediately before the expiry date or the termination date of the Contract to whom the Employment Regulations will apply on the Service Transfer Date whose contracts of employment transfer with effect from the Service Transfer Date to the Council or a Replacement Service Provider

2. INTERPRETATION

Where a provision in this Schedule imposes an obligation on the Contractor to provide an indemnity, undertaking or warranty, the Contractor shall procure that each of its Sub-contractors shall comply with such obligation and provide such indemnity, undertaking or warranty to the Council, Former Provider, Replacement Provider or Replacement Sub-contractor, as the case may be.

3. PROCEDURE IN THE EVENT OF TRANSFER

3.1 The Council and the Contractor agree that the commencement of the provision of the Services or of any part of the Services will not be a Relevant Transfer in relation to any employees of the Council and/or any Former Provider.

3.2 If any employee of the Council and/or a Former Provider claims, or it is determined in relation to any employee of the Council and/or a Former Provider, that his/her contract of employment has been transferred from the Council and/or the Former Provider to the Contractor and/or any Sub-contractor pursuant to the Employment Regulations or the Acquired Rights Directive then:

- (a) the Contractor shall, and shall procure that the relevant Sub-contractor shall, within five Working Days of becoming aware of that fact, give notice in writing to the Council and, where required by the Council, give notice to the Former Provider; and
- (b) the Council and/or the Former Provider may offer (or may procure that a third party may offer) employment to such person within 15 Working Days of the notification by the Contractor or the Sub-contractor (as appropriate) or take such other reasonable steps as the Council or Former Provider (as the case may be) considers appropriate to deal with the matter provided always that such steps are in compliance with applicable Law.

3.3 If an offer referred to in clause 3.2(b) is accepted (or if the situation has otherwise been resolved by the Council and/or the Former Provider), the Contractor shall, or shall procure that the Sub-contractor shall, immediately release the person from his/her employment or alleged employment.

3.4 If by the end of the 15 Working Day period specified in clause 3.2(b):

- (a) no such offer of employment has been made;
- (b) such offer has been made but not accepted; or
- (c) the situation has not otherwise been resolved,

the Contractor and/or the Sub-contractor may within five Working Days give notice to terminate the employment or alleged employment of such person.

4. INDEMNITIES

4.1 Subject to the Contractor and/or the relevant Sub-contractor acting in accordance with the provisions of clause 3.2 to clause 3.4 and in accordance with all applicable employment procedures set out in applicable Law and subject also to clause 4.4, the Council shall:

(a) indemnify the Contractor and/or the relevant Sub-contractor against all Employee Liabilities arising out of the termination of the employment of any employees of the Council referred to in clause 3.2 made pursuant to the provisions of clause 3.4 provided that the Contractor takes, or shall procure that the Notified Sub-contractor takes, all reasonable steps to minimise any such Employee Liabilities; and

(b) procure that the Former Provider indemnifies the Contractor and/or any Notified Sub-contractor against all Employee Liabilities arising out of termination of the employment of the employees of the Former Provider made pursuant to the provisions of clause 3.4 provided that the Contractor takes, or shall procure that the relevant Sub-contractor takes, all reasonable steps to minimise any such Employee Liabilities.

4.2 If any such person as is described in clause 3.2 is neither re employed by the Council and/or the Former Provider as appropriate nor dismissed by the Contractor and/or any Sub-contractor within the 15 Working Day period referred to in clause 3.4 such person shall be treated as having transferred to the Contractor and/or the Sub-contractor (as appropriate) and the Contractor shall, or shall procure that the Sub-contractor shall, comply with such obligations as may be imposed upon it under Law.

4.3 Where any person remains employed by the Contractor and/or any Sub-contractor pursuant to clause 4.2, all Employee Liabilities in relation to such employee shall remain with the Contractor and/or the Sub-contractor and the Contractor shall indemnify the Council and any Former Provider, and shall procure that the Sub-contractor shall indemnify the Council and any Former Provider, against any Employee Liabilities that either of them may incur in respect of any such employees of the Contractor and/or employees of the Sub-contractor.

4.4 The indemnities in clause 4.1:

(a) shall not apply to:

(i) in any case in relation to any alleged act or omission of the Contractor and/or any Sub-contractor, any claim for: (A) discrimination, including on the grounds of sex, race, disability, age, gender reassignment, marriage or civil partnership, pregnancy and maternity or sexual orientation, religion or belief; or (B) equal pay

or compensation for less favourable treatment of part-time workers or fixed-term employees; or

(ii) any claim that the termination of employment was unfair because the Contractor and/or any Sub-contractor neglected to follow a fair dismissal procedure; and
(b) shall apply only where the notification referred to in clause 3.2(a) is made by the Contractor and/or any Sub-contractor to the Council and, if applicable, Former Provider within six months of the Effective Date.

5. PROCUREMENT OBLIGATIONS

Where in this schedule the Council accepts an obligation to procure that a Former Provider does or does not do something, such obligation shall be limited so that it extends only to the extent that the Council's contract with the Former Provider contains a contractual right in that regard which the Council may enforce, or otherwise so that it requires only that the Council must use reasonable endeavours to procure that the Former Provider does or does not act accordingly.

6. RETENDERING AND PRE-SERVICE TRANSFER OBLIGATIONS

6.1 The Contractor agrees that within 20 Working Days of the earliest of:

(a) receipt of a notification from the Council of a Service Transfer or intended Service Transfer;

(b) receipt of the giving of notice of early termination or any Partial Termination of this Contract;

(c) the date which is 12 months before the end of the Term; and

(d) receipt of a written request of the Council at any time (provided that the Council shall only be entitled to make one such request in any six month period),

it shall provide at no cost to the Council and in a suitably anonymised format so as to comply with the Data Protection Legislation, the Contractor's Provisional Personnel List, together with the Staffing Information in relation to the Contractor's Provisional Personnel List and it shall provide an updated Contractor's Provisional Personnel List at such intervals as are reasonably requested by the Council.

6.2 At least 28 Working Days prior to the Service Transfer Date, the Contractor shall provide to the Council or at the direction of the Council to any Replacement Provider and/or any Replacement Sub-contractor:

(a) the Contractor's Final Personnel List, which shall identify which of the Contractor Personnel are Transferring Contractor Employees; and

(b) the Staffing Information in relation to the Contractor's Final Personnel List (insofar as such information has not previously been provided).

6.3 The Council shall be permitted to use and disclose information provided by the Contractor under clause 6.1 and clause 6.2 for the purpose of informing any prospective Replacement Provider and/or Replacement Sub-contractor.

6.4 The Contractor:

(a) shall promptly notify the Council forthwith in writing of any material changes to the information provided pursuant to clause 6.1 and clause 6.2 as and when such changes arise; and

- (b) warrants, for the benefit of the Council, any Replacement Provider, and any Replacement Sub-contractor that all information provided pursuant to clause 6.1 and clause 6.2 shall be true and accurate in all material respects at the time of providing the information.

6.5 From the date of the earliest event referred to in clause 6.1(a), clause 6.1(b) and clause 6.1(c), the Contractor agrees, that it shall not, and agrees to procure that each Sub-contractor shall not, assign any person to the provision of the Services who is not listed on the Contractor's Provisional Personnel List and shall not without the approval of the Council (not to be unreasonably withheld or delayed):

- (a) replace or re-deploy any Contractor Personnel listed on the Contractor Provisional Personnel List other than where any replacement is of equivalent grade, skills, experience and expertise and is employed on the same terms and conditions of employment as the person he/she replaces;
- (b) make, promise, propose or permit any material changes to the terms and conditions of employment of the Contractor Personnel (including any payments connected with the termination of employment);
- (c) increase the proportion of working time spent on the Services (or the relevant part of the Services) by any of the Contractor Personnel save for fulfilling assignments and projects previously scheduled and agreed;
- (d) introduce any new contractual or customary practice concerning the making of any lump sum payment on the termination of employment of any employees listed on the Contractor's Provisional Personnel List;
- (e) increase or reduce the total number of employees so engaged, or deploy any other person to perform the Services (or the relevant part of the Services); or
- (f) terminate or give notice to terminate the employment or contracts of any persons on the Contractor's Provisional Personnel List save by due disciplinary process, and shall promptly notify, and procure that each Sub-contractor shall promptly notify, the Council or, at the direction of the Council, any Replacement Provider and any Replacement Sub-contractor of any notice to terminate employment given by the Contractor or relevant Sub-contractor or received from any persons listed on the Contractor's Provisional Personnel List regardless of when such notice takes effect.

6.6 During the Term, the Contractor shall provide, and shall procure that each Sub-contractor shall provide, to the Council any information the Council may reasonably require relating to the manner in which the Services are organised, which shall include:

- (a) the numbers of employees engaged in providing the Services;
- (b) the percentage of time spent by each employee engaged in providing the Services; and
- (c) a description of the nature of the work undertaken by each employee by location.

6.7 The Contractor shall provide, and shall procure that each Sub-contractor shall provide, all reasonable cooperation and assistance to the Council, any Replacement Provider and/or any Replacement Sub-contractor to ensure the

smooth transfer of the Transferring Contractor Employees on the Service Transfer Date including providing sufficient information in advance of the Service Transfer Date to ensure that all necessary payroll arrangements can be made to enable the Transferring Contractor Employees to be paid as appropriate. Without prejudice to the generality of the foregoing, within 5 Working Days following the Service Transfer Date, the Contractor shall provide, and shall procure that each Sub-contractor shall provide, to the Council or, at the direction of the Council, to any Replacement Provider and/or any Replacement Sub-contractor (as appropriate), in respect of each person on the Contractor's Final Personnel List who is a Transferring Contractor Employee:

- (a) the most recent month's copy pay slip data;
- (b) details of cumulative pay for tax and pension purposes;
- (c) details of cumulative tax paid;
- (d) tax code;
- (e) details of any voluntary deductions from pay; and
- (f) bank/building society account details for payroll purposes.

6.8 The Council regards compliance with this paragraph 6 as fundamental to the Agreement. In particular, failure to comply with paragraphs 6.1 and 6.2 in respect of the provision of accurate information about the Transferring Contractor Employees shall entitle the Council to suspend payment of the Charges until such information is provided, or indefinitely. The maximum sum that may be retained under this paragraph 6.8 shall not exceed an amount equivalent to the Charges that would be payable in the three month period following the Contractor's failure to comply with paragraphs 6.1 or 6.2, as the case may be.

6.9 Any change to the Staffing Information which would increase the total employment costs of the staff in the six months prior to termination of this Agreement shall not (so far as reasonably practicable) take place without the Council's prior written consent, unless such changes are required by law. The Contractor shall supply to the Council full particulars of such proposed changes and the Council shall be afforded reasonable time to consider them.

6.10 The Contractor shall indemnify and shall keep indemnified in full the Council and at the Council's request any Replacement Provider against all Direct Losses arising from any claim by any party as a result of the Contractor or sub-contractor failing to provide or promptly to provide the Council and/or any Replacement Provider where requested by the Council with any information required under this Clause 6.1 to 6.4 inclusive ("the Retendering Information") and/or Employee Liability Information or to provide full Retendering Information and/or Employee Liability Information or as a result of any material inaccuracy in or omission from the Retendering Information and/or Employee Liability Information provided that this indemnity shall not apply to the extent that such information was originally provided to the Contractor or any sub-contractor by the Council and was materially inaccurate or incomplete when originally provided.

7. EMPLOYMENT REGULATIONS EXIT PROVISIONS

7.1 The Council and the Contractor acknowledge that subsequent to the commencement of the provision of the Services, the identity of the provider of the

Services (or any part of the Services) may change (whether as a result of termination or Partial Termination of this Contract or otherwise) resulting in the Services being undertaken by a Replacement Provider and/or a Replacement Sub-contractor. Such change in the identity of the Contractor of such services may constitute a Relevant Transfer to which the Employment Regulations and/or the Acquired Rights Directive will apply. The Council and the Contractor further agree that, as a result of the operation of the Employment Regulations, where a Relevant Transfer occurs, the contracts of employment between the Contractor and the Transferring Contractor Employees (except in relation to any contract terms disapplied through operation of regulation 10(2) of the Employment Regulations) will have effect on and from the Service Transfer Date as if originally made between the Replacement Provider and/or a Replacement Sub-contractor (as the case may be) and each such Transferring Contractor Employee.

7.2 The Contractor shall, and shall procure that each Sub-contractor shall, comply with all its obligations in respect of the Transferring Contractor Employees arising under the Employment Regulations in respect of the period up to (and including) the Service Transfer Date and shall perform and discharge, and procure that each Sub-contractor shall perform and discharge, all its obligations in respect of all the Transferring Contractor Employees and other employees or former employees of the Contractor or each Sub-contractor (who had been engaged in the provision of the Services) arising in respect of the period up to (and including) the Service Transfer Date (including the payment of all remuneration, benefits, entitlements and outgoings, all wages, accrued but untaken holiday pay, bonuses, commissions, payments of PAYE, national insurance contributions and pension contributions which in any case are attributable in whole or in part to the period ending on (and including) the Service Transfer Date) and any necessary apportionments in respect of any periodic payments shall be made between: (i) the Contractor and/or the Sub-contractor (as appropriate); and (ii) the Replacement Provider and/or Replacement Sub-contractor.

7.3 Subject to clause 7.4, the Contractor shall indemnify the Council and/or the Replacement Provider and/or any Replacement Sub-contractor against any Employee Liabilities in respect of any Transferring Contractor Employee (or, where applicable any employee representative as defined in the Employment Regulations) arising from or as a result of:

- (a) any act or omission of the Contractor or any Sub-contractor whether occurring before, on or after the Service Transfer Date;
- (b) the breach or non-observance by the Contractor or any Sub-contractor occurring on or before the Service Transfer Date of:
 - (i) any collective agreement applicable to the Transferring Contractor Employees; and/or
 - (ii) any other custom or practice with a trade union or staff association in respect of any Transferring Contractor Employees which the Contractor or any Sub-contractor is contractually bound to honour;
- (c) any claim by any trade union or other body or person representing any Transferring Contractor Employees arising from or connected with any failure by the Contractor or a Sub-contractor to comply with any legal

obligation to such trade union, body or person arising on or before the Service Transfer Date;

(d) any proceeding, claim or demand by HMRC or other statutory Council in respect of any financial obligation including, but not limited to, PAYE and primary and secondary national insurance contributions:

(i) in relation to any Transferring Contractor Employee, to the extent that the proceeding, claim or demand by HMRC or other statutory Council relates to financial obligations arising on and before the Service Transfer Date; and

(ii) in relation to any employee who is not a Transferring Contractor Employee, and in respect of whom it is later alleged or determined that the Employment Regulations applied so as to transfer his/her employment from the Contractor to the Council and/or Replacement Provider and/or any Replacement Sub-contractor, to the extent that the proceeding, claim or demand by HMRC or other statutory Council relates to financial obligations arising on or before the Service Transfer Date;

(e) a failure of the Contractor or any Sub-contractor to discharge or procure the discharge of all wages, salaries and all other benefits and all PAYE tax deductions and national insurance contributions relating to the Transferring Contractor Employees in respect of the period up to (and including) the Service Transfer Date);

(f) any claim made by or in respect of any person employed or formerly employed by the Contractor or any Sub-contractor other than a Transferring Contractor Employee for whom it is alleged the Council and/or the Replacement Provider and/or any Replacement Sub-contractor may be liable by virtue of this Contract and/or the Employment Regulations and/or the Acquired Rights Directive; and

(g) any claim made by or in respect of a Transferring Contractor Employee or any appropriate employee representative (as defined in the Employment Regulations) of any Transferring Provider Employee relating to any act or omission of the Contractor or any Sub-contractor in relation to its obligations under regulation 13 of the Employment Regulations, except to the extent that the liability arises from the failure by the Council and/or Replacement Provider to comply with regulation 13(4) of the Employment Regulations.

7.4 The indemnities in clause 7.3 shall not apply to the extent that the Employee Liabilities arise or are attributable to an act or omission of the Replacement Provider and/or any Replacement Sub-contractor whether occurring or having its origin before, on or after the Service Transfer Date, including any Employee Liabilities:

(a) arising out of the resignation of any Transferring Contractor Employee before the Service Transfer Date on account of substantial detrimental changes to his/her working conditions proposed by the Replacement Provider and/or any Replacement Sub-contractor to occur in the period on or after the Service Transfer Date); or

(b) arising from the Replacement Provider's failure, and/or Replacement Sub-contractor's failure, to comply with its obligations under the Employment Regulations.

7.5 If any person who is not a Transferring Contractor Employee claims, or it is determined in relation to any person who is not a Transferring Contractor Employee, that his/her contract of employment has been transferred from the Contractor or any Sub-contractor to the Replacement Provider and/or Replacement Sub-contractor pursuant to the Employment Regulations or the Acquired Rights Directive, then:

- (a) the Council shall procure that the Replacement Provider shall, or any Replacement Sub-contractor shall, within five Working Days of becoming aware of that fact, give notice in writing to the Contractor; and
- (b) the Contractor may offer (or may procure that a Sub-contractor may offer) employment to such person within 15 Working Days of the notification by the Replacement Provider and/or any and/or Replacement Sub-contractor or take such other reasonable steps as it considers appropriate to deal with the matter provided always that such steps are in compliance with Law.

7.6 If such offer is accepted, or if the situation has otherwise been resolved by the Contractor or a Sub-contractor, the Council shall procure that the Replacement Provider shall, or procure that the Replacement Sub-contractor shall, immediately release or procure the release of the person from his/her employment or alleged employment.

7.7 If after the 15th Working Day period specified in clause 7.5(b) has elapsed:

- (a) no such offer of employment has been made;
- (b) such offer has been made but not accepted; or
- (c) the situation has not otherwise been resolved

the Council shall advise the Replacement Provider and/or Replacement Sub-contractor, as appropriate that it may within five Working Days give notice to terminate the employment or alleged employment of such person.

7.8 Subject to the Replacement Provider and/or Replacement Sub-contractor acting in accordance with the provisions of clause 7.5 to clause 7.7, and in accordance with all applicable proper employment procedures set out in applicable Law, the Contractor shall indemnify the Replacement Provider and/or Replacement Sub-contractor against all Employee Liabilities arising out of the termination pursuant to the provisions of clause 7.7 provided that the Replacement Provider takes, or shall procure that the Replacement Sub-contractor takes, all reasonable steps to minimise any such Employee Liabilities.

7.9 The indemnity in clause 7.8:

- (a) shall not apply to:
 - (i) in any case in relation to any alleged act or omission of the Replacement Provider and/or Replacement Sub-contractor, any claim for: (A) discrimination, including on the grounds of sex, race, disability, age, gender reassignment, marriage or civil partnership, pregnancy and maternity or sexual orientation, religion or belief; or (B) equal pay or compensation for less favourable treatment of part-time workers or fixed-term employees; or

(ii) any claim that the termination of employment was unfair because the Replacement Provider and/or Replacement Sub-contractor neglected to follow a fair dismissal procedure; and

(b) shall apply only where the notification referred to in clause 7.5(a) is made by the Replacement Provider and/or Replacement Sub-contractor to the Contractor within six months of the Service Transfer Date.

7.10 If any such person as is described in clause 7.5 is neither re-employed by the Contractor or any Sub-contractor nor dismissed by the Replacement Provider and/or Replacement Sub-contractor within the time scales set out in clause 7.5 to clause 7.7, such person shall be treated as a Transferring Contractor Employee and the Replacement Provider and/or Replacement Sub-contractor shall comply with such obligations as may be imposed upon it under applicable Law.

7.11 Not Used.

7.12 The Contractor shall, and shall procure that each Sub-contractor shall, promptly provide to the Council and any Replacement Provider and/or Replacement Sub-contractor, in writing such information as is necessary to enable the Council, the Replacement Provider and/or Replacement Sub-contractor to carry out their respective duties under regulation 13 of the Employment Regulations. The Council shall procure that the Replacement Provider and/or Replacement Sub-contractor, shall promptly provide to the Contractor and each Sub-contractor in writing such information as is necessary to enable the Contractor and each Sub-contractor to carry out their respective duties under regulation 13 of the Employment Regulations.

7.13 Subject to clause 7.14, the Council shall procure that the Replacement Provider indemnifies the Contractor on its own behalf and on behalf of any Replacement Sub-contractor and its sub-contractors against any Employee Liabilities in respect of each Transferring Contractor Employee (or, where applicable any employee representative (as defined in the Employment Regulations) of any Transferring Contractor Employee) arising from or as a result of:

(a) any act or omission of the Replacement Provider and/or Replacement Sub-contractor;

(b) the breach or non-observance by the Replacement Provider and/or Replacement Sub-contractor on or after the Service Transfer Date of:

(i) any collective agreement applicable to the Transferring Contractor Employees; and/or

(ii) any custom or practice in respect of any Transferring Contractor Employees which the Replacement Provider and/or Replacement Sub-contractor is contractually bound to honour;

(c) any claim by any trade union or other body or person representing any Transferring Contractor Employees arising from or connected with any failure by the Replacement Provider and/or Replacement Sub-contractor to comply with any legal obligation to such trade union, body or person arising on or after the Service Transfer Date;

(d) any proposal by the Replacement Provider and/or Replacement Sub-contractor to change the terms and conditions of employment or working conditions of any Transferring Contractor Employees on or after their transfer to the Replacement Provider or Replacement Sub-contractor (as the case may be) on the Relevant Transfer Date, or to change the terms and conditions of employment or working conditions of any person who would have been a Transferring Contractor Employee but for their resignation (or decision to treat their employment as terminated under regulation 4(9) of the Employment Regulations) before the Service Transfer Date as a result of or for a reason connected to such proposed changes;

(e) any statement communicated to or action undertaken by the Replacement Provider or Replacement Sub-contractor to, or in respect of, any Transferring Contractor Employee on or before the Service Transfer Date regarding the Relevant Transfer which has not been agreed in advance with the Contractor in writing;

(f) any proceeding, claim or demand by HMRC or other statutory Council in respect of any financial obligation including, but not limited to, PAYE and primary and secondary national insurance contributions:

(i) in relation to any Transferring Contractor Employee, to the extent that the proceeding, claim or demand by HMRC or other statutory Council relates to financial obligations arising after the Service Transfer Date; and

(ii) in relation to any employee who is not a Transferring Contractor Employee, and in respect of whom it is later alleged or determined that the Employment Regulations applied so as to transfer his/her employment from the Contractor or Sub-contractor, to the Replacement Contractor or Replacement Sub-contractor to the extent that the proceeding, claim or demand by HMRC or other statutory Council relates to financial obligations arising after the Service Transfer Date;

(g) a failure of the Replacement Provider or Replacement Sub-contractor to discharge or procure the discharge of all wages, salaries and all other benefits and all PAYE tax deductions and national insurance contributions relating to the Transferring Contractor Employees in respect of the period from (and including) the Service Transfer Date; and

(h) any claim made by or in respect of a Transferring Contractor Employee or any appropriate employee representative (as defined in the Employment Regulations) of any Transferring Contractor Employee relating to any act or omission of the Replacement Provider or Replacement Sub-contractor in relation to obligations under regulation 13 of the Employment Regulations.

7.14 The indemnities in clause 7.13 shall not apply to the extent that the Employee Liabilities arise or are attributable to an act or omission of the Contractor and/or any Sub-contractor (as applicable) whether occurring or having its origin before, on or after the Service Transfer Date, including any Employee Liabilities arising from the failure by the Contractor and/or any Sub-contractor (as applicable) to comply with its obligations under the Employment Regulations.

7.15 The parties shall co-operate to ensure that any requirement to inform and consult with the employees and or employee representatives in relation to any Relevant Transfer to a Replacement Provider will be fulfilled.

7.16 The parties agree that the Contracts (Rights of Third Parties) Act 1999 shall apply to clause 6 and 7, to the extent necessary to ensure that any Replacement Provider shall have the right to enforce the obligations owed to, and indemnities given to, the Replacement Provider by the Contractor or the Council in its own right under section 1(1) of the Contracts (Rights of Third Parties) Act 1999.

7.17 Despite clause 7.16, it is expressly agreed that the parties may by agreement rescind or vary any terms of this Agreement without the consent of any other person who has the right to enforce its terms or the term in question despite that such rescission or variation may extinguish or alter that person's entitlement under that right.

Annex B. Transferring Council Employees – N/A
Annex C. Transferring Former Provider Employees – N/A
Annex D. List of Notified Sub-contractors- N/A

Schedule 5

Processing, Personal Data and Data Subjects

This Schedule shall be completed by the Data Controller, who may take account of the view of the Data Processors, however the final decision as to the content of this Schedule shall be with the Controller at its absolute discretion.

1. The contact details of the Data Controller's Data Protection Officer are: Information Governance Officer email: Information.Request@Shropshire.gov.uk
2. The contact details of the Data Processor's Data Protection Officer are: **[Insert Contact details]**
3. The Data Processor shall comply with any further written instructions with respect to processing by the Data Controller.
4. Any such further instructions shall be incorporated into this Schedule.

Description	Details
Identity of the Data Controller and Data Processor	The Parties acknowledge that for the purposes of the Data Protection Legislation, the Council is the Data Controller and the Contractor is the Data Processor in accordance with Clause 18.1.
Subject matter of the processing	The processing is needed in order to ensure that the Data Processor can effectively deliver and meet its obligations under the contract and to enable the Council to meet its statutory obligations towards the promotion of independent living and wellbeing under the Care Act 2014 by ensuring the safety and reliability of Assisted Living Equipment installed in Council owned and privately owned properties (where the householders have assessed eligible needs further to the Care Act 2014).
Duration of the processing	The processing shall only be undertaken during the Term of the Agreement
Nature and purposes of the processing	The nature of the processing means any operation such as collection, recording, organisation, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction of data (whether or not by automated means) etc. The purpose of the processing is to enable the Contractor to be provided with contact lists for sites/properties requiring service visits to be scheduled and service reports to be disseminated
Type of Personal Data	shall include:

	Householders/Property Manager's/ Council employees names Householders/Property Manager's Addresses telephone numbers, email addresses Job titles
Categories of Data Subject	Householders in receipt of Assisted Living Equipment and/or family members acting as authorised contacts for the householder Property Managers of buildings housing Assisted Living Equipment Council staff
Plan for return and destruction of the data once the processing is complete UNLESS legal requirement to preserve that type of data	Data should be retained during the Term of this Agreement and thereafter destroyed as instructed by the Council

Appendix 1

Tender

Shropshire Council
Shirehall
Abbey Foregate
Shrewsbury
Shropshire SY2 6ND

Date: 14th April 2022

My Ref: RMCB 040

Your Ref: RMCB 040

Dear Bidder

**RMCB 040 - MAINTENANCE AND REPAIR OF ASSISTED LIVING EQUIPMENT
SHROPSHIRE COUNCIL**

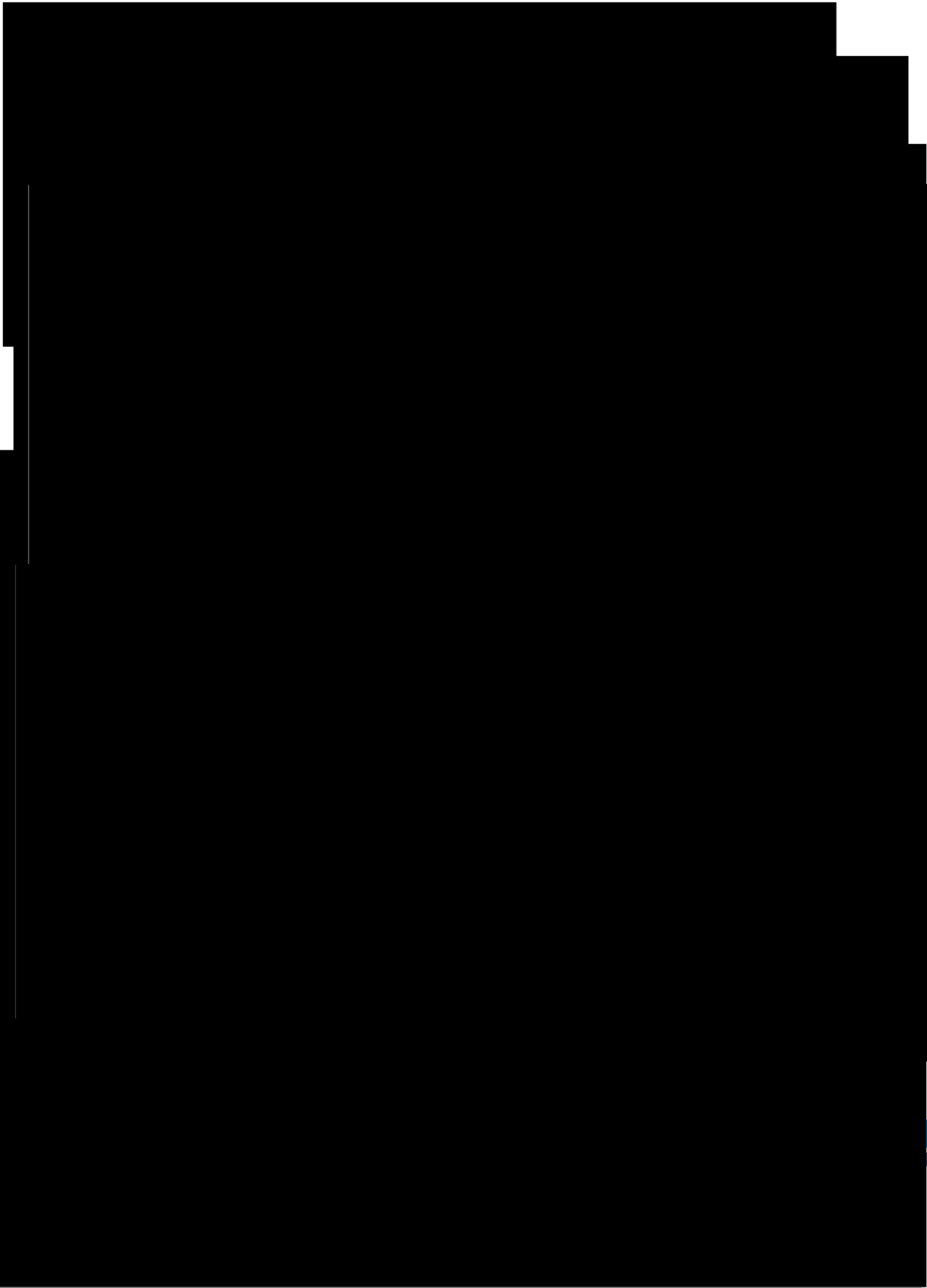
SUBJECT TO CONTRACT

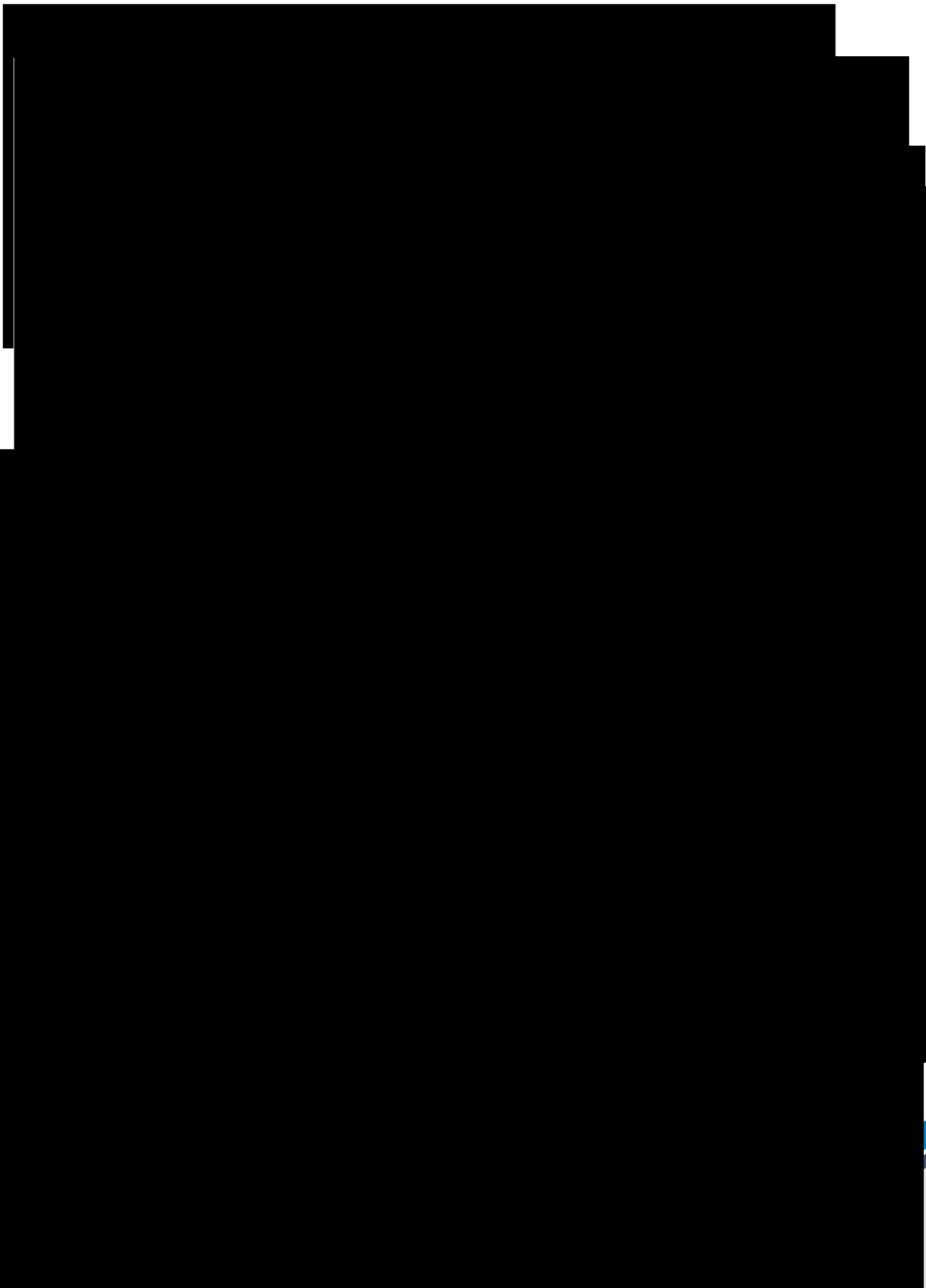
This is an Award Decision Notice.

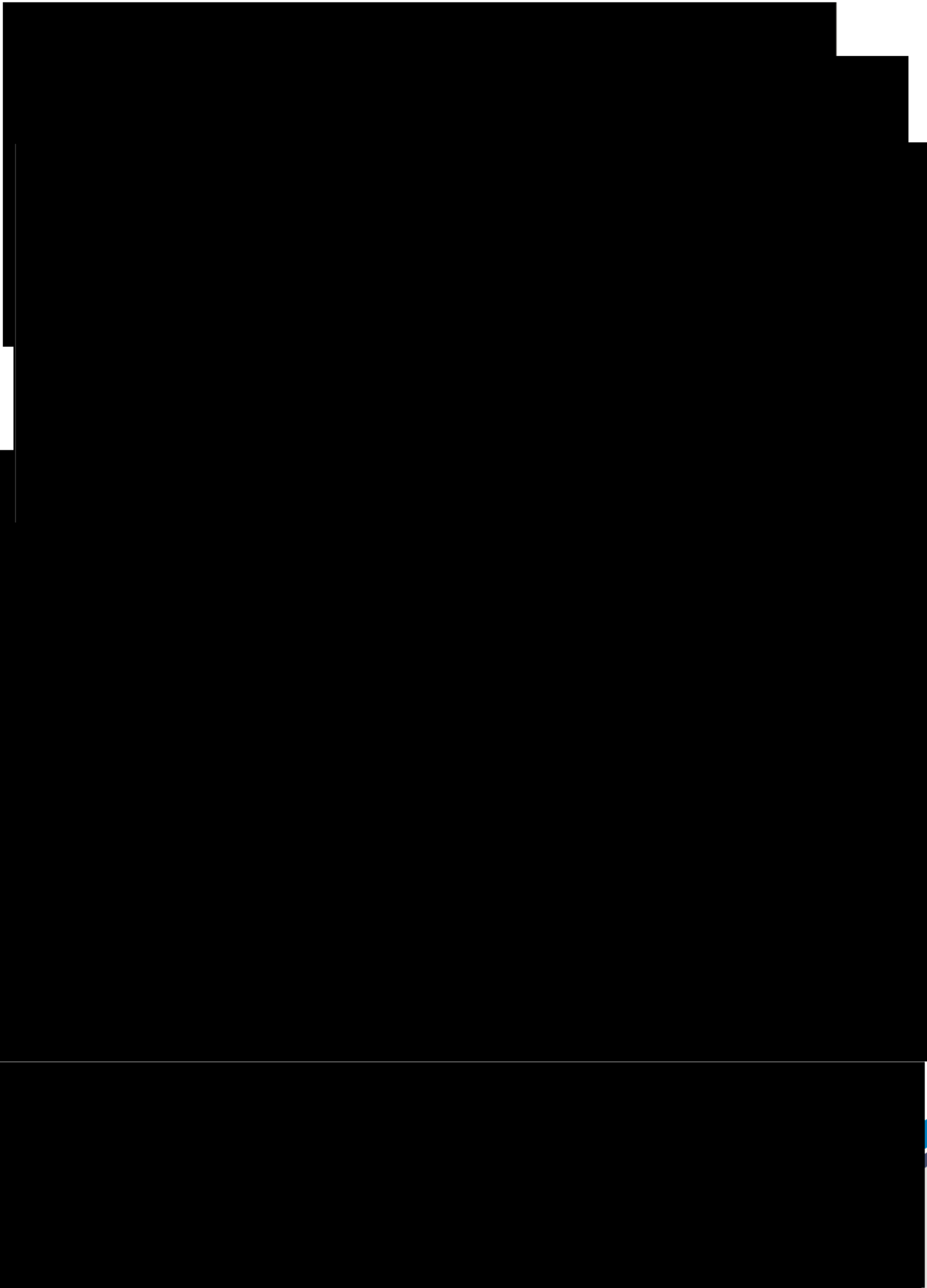
We are pleased to inform you that, following the evaluation process, Shropshire Council proposes to accept your offer in relation to the above Contract.

The award criteria for this contract were set out in full in Invitation to Tender with Price accounting for 40% of the total marks, Quality accounting for 50% of the total marks and Social Value accounting for 10% of the total marks.

We can confirm that your tender received the following scores and ranking:-







[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

UK-Shrewsbury: Repair and maintenance services of electrical machinery, apparatus and associated equipment.

UK-Shrewsbury: Repair and maintenance services of electrical machinery, apparatus and associated equipment.

Section I: Contracting Authority

I.1) Name, Addresses and Contact Point(s):

Shropshire Council

Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND, United Kingdom

Email: [REDACTED]

Contact: Procurement

Main Address: [REDACTED]

NUTS Code: UKG22

I.2) Joint procurement:

The contract involves joint procurement: No

In the case of joint procurement involving different countries, state applicable national procurement law:
Not Provided

The contract is awarded by a central purchasing body: No

I.4) Type of the contracting authority:

Regional or local authority

I.5) Main activity:

General public services

Section II: Object Of The Contract

II.1) Scope of the procurement

II.1.1) Title: RMCB 040 - Maintenance and Repair of Assisted Living Equipment

Reference number: RMCB 040

II.1.2) Main CPV code:

50532000 - Repair and maintenance services of electrical machinery, apparatus and associated equipment.

II.1.3) Type of contract: SERVICES

II.1.4) Short description: This is an award notice for the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

The contract will be for the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.

II.1.6) Information about lots

This contract is divided into lots: No

II.1.7) Total value of the procurement (excluding VAT)

[REDACTED]

Currency:GBP

II.2) Description

II.2.2) Additional CPV code(s):
44115600 - Stairlifts.

II.2.3) Place of performance
Nuts code:
UKG22 - Shropshire CC

Main site or place of performance:
Shropshire CC

II.2.4) Description of the procurement: This is an award notice for the inspection, testing, certification and repair works of the following Assisted Living Equipment at the Councils Properties along with those of other external clients to the Council.

Lifts, ceiling track hoists, bath and stretchers complying with:

- 1)BS 5900:2012 Powered homelifts with partially enclosed carriers and no liftway enclosures.
- 2)BS 5965:1980 Specification for manually driven balanced personal home lifts.
- 3)BS 6440:2011 Powered vertical lifting platforms having non-enclosed or partially enclosed liftways intended for use by persons with impaired mobility - specification.
- 4)BS5776:1996 Specification for powered stairlifts

The contract will be for the period 1st June 2022 – 31st March 2025. Thereafter, the contract may be extended for a further 2 years (up to 31st March 2027) subject to satisfactory performance during the contract year and the agreement of the costs for the ensuing 12 months.
The value stated is for the full duration of the contract.

II.2.5) Award criteria:
Quality criterion - Name: Quality / Weighting: 50
Quality criterion - Name: Social Value / Weighting: 10

Cost criterion - Name: Price / Weighting: 40

II.2.11) Information about options
Options: No

II.2.13) Information about European Union funds
The procurement is related to a project and/or programme financed by European Union funds: No

II.2.14) Additional information: Not Provided

Section IV: Procedure

IV.1) Description

IV.1.1) Type of procedure: Open

IV.1.3) Information about a framework agreement or a dynamic purchasing system

The procurement involves the establishment of a framework agreement: No

IV.1.6) Information about electronic auction

An electronic auction has been used: No

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: No

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure

Notice number in the OJEU: 2022/S 000-004851

IV.2.9) Information about termination of call for competition in the form of a prior information notice

The contracting authority will not award any further contracts based on the above prior information notice: No

Section V: Award of contract

Award Of Contract (No.1)

Contract No: Not Provided

Lot Number: Not Provided

Title: Not Provided

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract: 25/04/2022

V.2.2) Information about tenders

Number of tenders received: 4

Number of tenders received from SMEs: Not Provided

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 0

Number of tenders received by electronic means: 4

V.2.3) Name and address of the contractor

The contract has been awarded to a group of economic operators: No

Contractor (No.1)

Stannah Lift Services Ltd, 01189799
Watt Close, East Portway Industrial Estate, Andover, SP10 3SD, United Kingdom
NUTS Code: UKJ37
The contractor is an SME: No

V.2.4) Information on value of the contract/lot (excluding VAT)

Initial estimated total value of the contract/lot: Not Provided

[REDACTED]

Currency: GBP

V.2.5) Information about subcontracting

The contract is likely to be subcontracted: No

Section VI: Complementary information

VI.3) Additional information: To view this notice, please click here:

<https://www.delta-esourcing.com/delta/viewNotice.html?noticeId=688956625>

VI.4) Procedures for review

VI.4.1) Review body

Shropshire Council

Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND, United Kingdom

[REDACTED]

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures: Not Provided

VI.4.4) Service from which information about the review procedure may be obtained

Shropshire Council

Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND, United Kingdom

[REDACTED]

VI.5) Date of dispatch of this notice: 09/05/2022