



FRAMEWORK AGREEMENT GUIDE

Energy Efficiency and Refurbishment (N7)



WHY WORK WITH LHC?

These are the key reasons to work with LHC whether you're a public sector organisation looking for procurement solutions or a supplier with products or services to provide.

Knowledge and experience of procurement

Our organisation began half a century ago and over five decades we've developed and shaped our service to meet the evolving needs of our clients.

Recognised technical expertise

Our technical expertise is built on continuous research by our team of technical specialists who consult with clients on the outcomes they need and suppliers on the range of available solutions.

Commitment to better buildings and homes

Our ultimate goal is helping our clients deliver better environments for the communities they serve, a goal we support through our frameworks, that address every aspect of quality, and our selection of the most appropriate suppliers.

Fast and efficient procurement

Once LHC appointed companies are established for a framework, the process of calling off projects and commissioning work is very efficient. Terms and rates have been agreed and even when a mini competition is required, the majority of contractual arrangements have already been finalised. Project work can start quickly.

Financial gains

Working with LHC frameworks gives suppliers access to construction, refurbishment and maintenance projects of over £200m each financial year. Clients who spend more than £200,000 on two or more frameworks in a year will benefit from a share in the LHC operating surplus we return to Members. During the last five years, we have given back a total of £8m to our members.

WWW.LHC.GOV.UK/MEMBERSHIP

About this framework agreement

Local authorities, housing associations and other public sector organisations often require easy access to a range of energy efficiency and refurbishment measures and related consultancy and project management services.

LHC can help procure for these requirements through its OJEU compliant, Energy Efficiency and Refurbishment framework for the supply and installation of energy efficiency and refurbishment measures.

Companies appointed to the framework have demonstrated quality and best value in terms of the systems offered, the installation process and the overall service provided, both to the clients and their residents.

The framework consists of three distinct options which are designed to meet clients' specific needs. These include:

- Energy Consultants and Project Management - Workstream 1
- Individual Energy Efficiency and Renewable Measures - Workstream 2
- All Energy Measures Including Refurbishment Works - Workstream 3

The framework is available for:

- Individual dwellings - houses and flats
- Houses in multiple occupation
- Residential Blocks - Low-Rise, Medium Rise and Tower Blocks
- Residential homes including those with vulnerable persons, (e.g. Care Homes and Hostels)

Additionally, it shall include commercial properties owned and or managed by a public body such as:

- Commercial office buildings, central or local housing team offices, halls, community centres and day care centres

- Schools
- Colleges
- Universities
- Research establishments
- Public offices
- Other properties owned or managed by a public body Framework end user

The framework shall provide the LHC members with the ability to provide the service in the following types of ownership:

- Their own properties - offices, libraries, sports hall etc.
- Their own tenanted housing
- Leaseholders within managed blocks
- Leaseholders and home owners within their jurisdiction
- Commercial Leaseholders
- Private individuals

Performance standards

Companies appointed to the framework and any systems installed meet respective performance standards including:

- CE marking to harmonised standards
- Installed by approved and specialist contractors who are PAS 2030 and MCS or equivalent approved

- British Board of Agreements (BBA) and Microgeneration Certificate Scheme (MCS) approved or equivalent systems and components and system and installation guarantees (including compliance with funding requirements such as ECO)
- Contractors who have demonstrated proven tenant engagement
- Competent installers who demonstrated appropriate qualifications, experience and product training for each product offered

Energy consultants and project management – Workstream 1

This option addresses the need for landlords/occupiers of public sector buildings to understand the energy in use of their buildings, through the provision of consultancy and project management services.

This includes:

- Measurement of your Energy consumption and Carbon emission
- The assessment and recommendations for energy efficiency improvements
- Providing client support through the project from contract set-up, planning and project management, including principle design duties and site inspections

This option can be used in isolation or to complement measures used through Workstream 2 and Workstream 3 where consultancy and project management services are required.

Services offered through this framework include:

Building energy policy and strategy development

- Policy support, strategy development, implementation and investment planning for energy initiatives
- Specification of monitoring and testing regimes
- Setting of energy targets
- Staff training and engagement programmes
- HECA and fuel poverty strategy and reporting
- Low and zero carbon feasibility studies

Quantity surveyors

The provision of quantity surveying and value engineering services including:

- Approving pricing and rating variations
- Pre-contract involvement
- Assistance with claims
- Dispute resolution

Chartered surveyors reports and Green Deal Advice Reports (GDAR)

- Building condition surveys and reports
- Funding compliance such as ECO
- Special measures such as hard to treat cavities

BREEAM assessments

- Domestic and non-domestic

Funding and finance assistance

The provision of bespoke proposals to help clients access European and UK funding and finance for building refurbishment projects.

This includes the submission of funding and finance proposals for the installation, feasibility, monitoring and compliance requirements of low and zero carbon refurbishment measures and community energy projects. These can assist clients meet their energy efficiency, fuel poverty, climate change adaptation and carbon reduction targets.

Building energy certificates

- Display Energy Certificates (DEC)
- Advisory Report (AR)
- Energy Performance Certificates (EPC)
- Domestic and Energy Performance Certificates (EPC)
- Non-Domestic

Stock condition surveys and reports

- Property condition surveys
- EPC Reports
- Health and safety risk assessments

Product specification and procurement

Including:

- Preparing and developing tender and technical documentation
- Draft proposals
- Preparing scheme design with costings
- Programmes for completion of projects and specification of works
- Ensuring buildability
- Compliance with building regulations
- Funding and finance requirements
- Planning

Energy audits and surveys

Provision of energy audit and surveys to recommend improvement measures, that include:

- Associated costs
- Anticipated energy savings from an energy efficiency investment for buildings
- Energy monitoring and targeting services including specification of monitoring regimes and defining an appropriate monitoring and targeting system to meet the building and occupiers needs
- The analysis of energy profiles to help characterise building energy performance, including risk from overheating and independent reports on metering arrangements

Project management services

The provision of a consultant to manage projects on behalf of clients. This includes being the interface between the client, other design team members and the principle contractors to ensure the delivery of the project on time, budget and to the required quality standards.

Clerk of works provision

- Make regular visits to sites
- Ensure that work is carried out properly to the clients' standards, specification and schedule
- Ensure health and safety rules are being followed including ensuring Risk Assessment and Method Statements (RAMS) are being adhered to and recorded

Principle design duties

- Undertake the duties of the Construction and Design Management (CDM) Regulations 2015 as principal designer in line with Regulations 11 & 12 for notifiable and non-notifiable work
- Act as clients advisor for all non-notifiable CDM projects where the client may be appointed as the principle designer
- Including both pre-contract services (up to end of RIBA stage 3) and post-contract services (RIBA stages 4-6)

Health and safety advisors

To ensure that clients duties under the Health and Safety at Work Act are reasonably and practicably handed over to a competent principle contractor. This includes assistance at the tender and work stages, (including post completion, commissioning and handover) and supervision of the appointed principle contractor to ensure:

- Compliance with the Health and Safety At Work Act and CDM Regulations 2015
- Advising clients of health and safety requirements
- Inspection of sites and works to ensure that the level of health and safety to the client's employees, tenants and the general public are maintained
- Minimise operational losses, occupational health problems, accidents and injuries

Individual energy efficiency and renewable measures – Workstream 2

This option provides the opportunity for clients to appoint local SME specialist approved installers, who can offer the complete design, supply, installation and commissioning and where appropriate, maintain and repair, of at least one or more energy efficiency or renewable energy measure.

Companies appointed to the framework are competent contractors (PAS 2030 and MCS or equivalent certified installers and approved system manufacturers/suppliers) who are capable of providing clients with full project management services.

This will be typically for small to medium scale energy efficiency projects.

Companies are also capable of providing the full range of enabling and ancillary measures, (such as scaffolding), and can offer a full suite of appropriate guarantees and warranties.

Each measure has its own product performance and installation requirement.

Insulation measures

The range of energy efficiency and renewable energy systems comply with all relevant funding streams and are suitable for traditional and non-traditional properties. Performance requirements meet building regulations including appropriate regional variations and are eligible for relevant funding.

External wall insulation

A choice of insulation types, including direct fix and rail, are offered with a range of finishes.

Cavity wall insulation

A choice of insulation types are available for easy and hard to treat extraction applications.

Internal wall insulation

Four insulation methods are available:

- Blown behind existing wall linings
- Applied on existing wall linings
- Directly applied to masonry or plaster (including sprayed e.g. cellulose fibre) and held in place by framing with studwork or rail type

Insulation materials

For both virgin and top up insulation requirements and associated measures.

Insulation methods include:

- Floor work
- Pipe work
- Lofts and hatches
- Hot and cold water tanks
- Duct work
- Draught proofing

Heating and Renewable Measures

Systems are Microgeneration Certificate Scheme (MCS) and Renewable Energy Consumer Code (RECC) equivalent approved and, where relevant, eligible for funding. All installations can be provided with energy meters.

Biomass heating boiler systems

Using manually and automatically stoked wood pellets, wood chips and log solid fuels, with a normal heat output of up to 500 kw, that generate hot water and space heating. Domestic to commercial sized Biomass boiler and feed systems for various fuels sources.

Photovoltaic systems

Roof mounted and free standing grid connected MCS or equivalent approved systems.

The choice of system types include thin film, mono and poly-crystalline types and declared net capacities, offering a range of different performance requirements.

For roof integrated photovoltaic and solar thermal systems, refer to the LHC 'PR3-Pitched Roofing and Associated products' framework (Due mid 2016).

Air source heat pump systems (air to water)

Single Split units for heating and/or hot water to Larger 3 Phase units that can be used with multiple independent inside units used for domestic and commercial clients.

District heating (heat interface units)

This includes connections for indirect heating and instantaneous domestic hot water use for domestic dwellings, including connection to or an upgrade to an existing or new district heating system.

Traditional boilers

Condensing Gas and Oil fired boilers Heat only, System and Combi boilers used in the majority in homes and plant rooms.

Heating systems

- Replacement components
- Full wet systems
- Hot water systems

All energy efficiency measures including refurbishment works – Workstream 3

This option provides the opportunity for clients to appoint main contractors for larger scale refurbishments and retrofit projects, who can offer the complete design, supply, installation and commissioning and where appropriate, maintain and repair, of at least one or more energy efficiency or renewable energy measure.

These companies offer the full spectrum of energy efficiency and renewable energy systems, with the addition of refurbishment and project management services.

Project Management

- Managing subcontractors and multi-discipline trades
- Site management and clerk of works services
- Quantity surveying

Energy efficiency measures

See 'Individual energy efficiency and renewable energy measures – Workstream 2'.

Refurbishment works

- Kitchen and bathroom replacements
- Window and door replacements
- Building repairs and alterations
- Internal finishes
- Internal and external decoration
- Soffit and fascia repair and replacement
- Plumbing and drainage
- Electrical rewires, power and lighting
- Minor roof repairs
- Concrete repairs
- External walls and bin cupboards
- Footpaths
- Fencing
- Landscape gardening

The framework in action

As well as providing compliance, quality and best value to clients, the LHC Framework for Energy Efficiency and Refurbishment supports a streamlined process from the award of a contract (call-off) to completion of a project.

Confirmed competitive market prices

Prices in place at call-off stage maintaining best value as established in the evaluation stage.

Quick and efficient procurement

Speedy access to LHC appointed companies and the options of a mini-competition or direct award to enable the final selection of a supplier or supplier(s) for a project.

Instant access to project data

Continuous access to information throughout the procurement process through the suppliers' on-line portal.

High quality standards

Standards of quality maintained throughout the project through monitoring in accordance with ISO 9001 Quality Management System.

Service levels guarantee

Guaranteed service levels from inquiry to supply providing peace of mind that services and works will be conducted effectively.

Quick project starts

Enabled by pre-tendered procurement that reduces the cost and time input by public sector organisations and speeds up their access to companies.

Advice on design and regulatory compliance

Guidance on interpretation and conformity to statutory regulations and planning requirements.

Delivery periods guarantee

Guaranteed delivery periods that ensure services and works are delivered to meet work schedules.

About the tender

The tender process for this framework followed LHC's Open Procedure which eliminates the Pre-Qualification Questionnaire stage. Suppliers were given free and open access to the tender and offer documentation and answered suitability assessment questions.

Selection criteria

- Financial Information
- Experience of working in the public sector and partnering
- Business and professional standing
- Membership of professional bodies and/or trade associations and technical associations
- Health and safety policy and capability
- Managerial and technical support, sales, marketing and supporting information
- Technical and professional ability
- Equal opportunities and diversity policy and capability
- Environmental management policy and capability
- Technical and professional ability
- Quality management policy and capability
- Providing the full range of essential components on offer
- Corporate social responsibility requirements
- Conformity to the LHC specification together with the expertise and quality to deliver



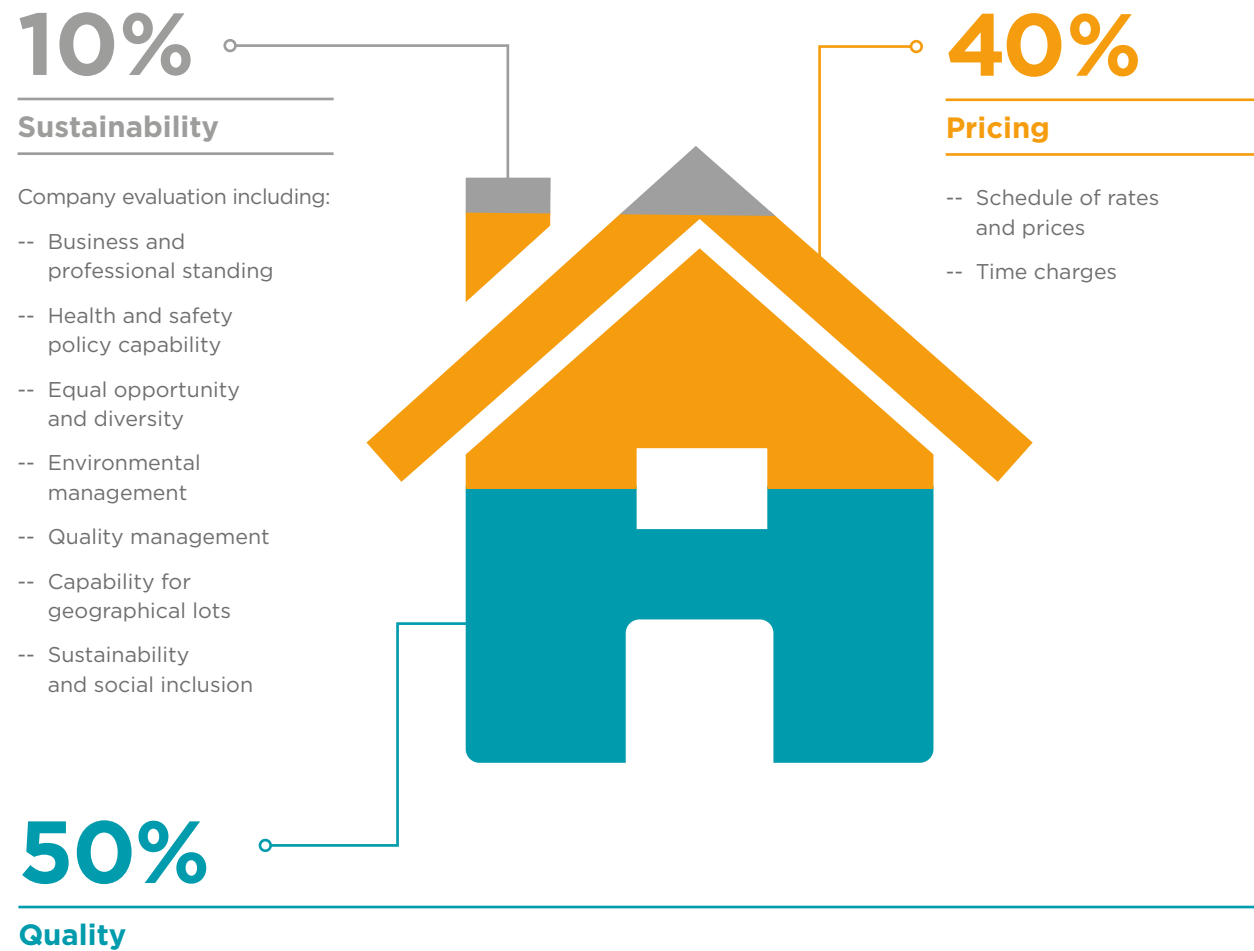
From suitability to call-off contract

The diagram below shows the process a supplier completes to become an LHC appointed company and to be awarded a contract (or "call-off"). It also highlights the support LHC provides once a project is live.



Award weighting criteria - Workstream 1

Energy consultants and project management (WS1)

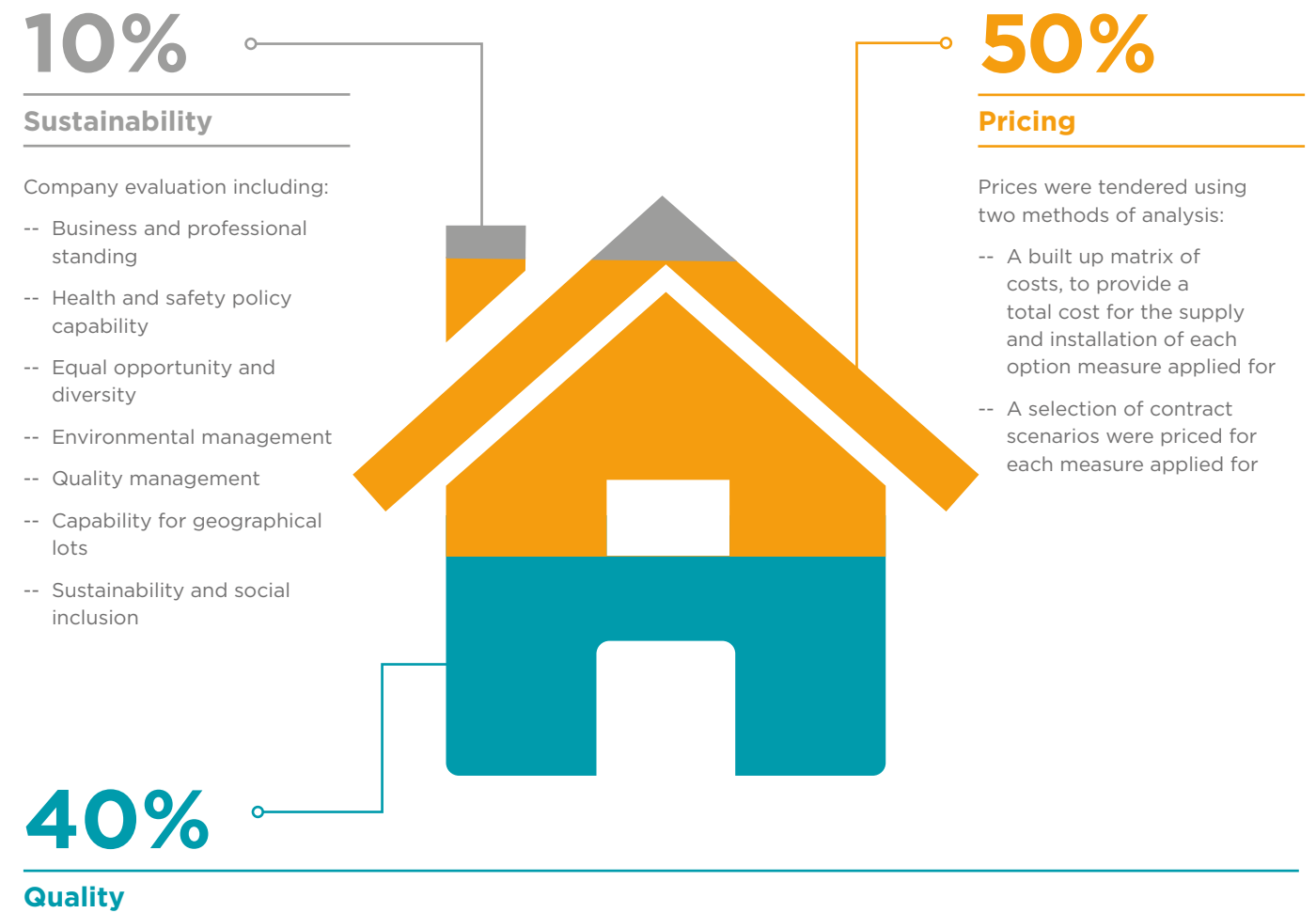


- Administrative and management services were assessed using responses given within the offer document. Activities covered by the assessment included:
- Conformity to the LHC specification
 - Quality of delivery and expertise
 - Application and comprehensiveness of service
 - Framework management
 - Management of specific call off contracts
 - Performance management
 - Customer service
 - Project registration, planning, tracking and programming
 - Suppliers core project team
 - Client, contractor and resident liaison
 - Site management including project supervision and meetings
 - Compliance with survey and installation codes of practice
 - Final inspection and signing off procedures
 - Cost management service
 - Technical support
 - Advice on statutory regulations, support in planning and obtaining funding

Award weighting criteria are established on each individual framework and can be flexed to a buyer's individual needs.

Award weighting criteria - Workstream 2 & 3

Individual energy efficiency measures and all energy measures including refurbishment works options (WS2) and (WS3)



Regional availability

This framework agreement has been established in strict compliance with UK Public Sector procurement rules as detailed in the buyer profile (www.lhc.gov.uk/buyerprofile) and as specified in the Contract Notices:

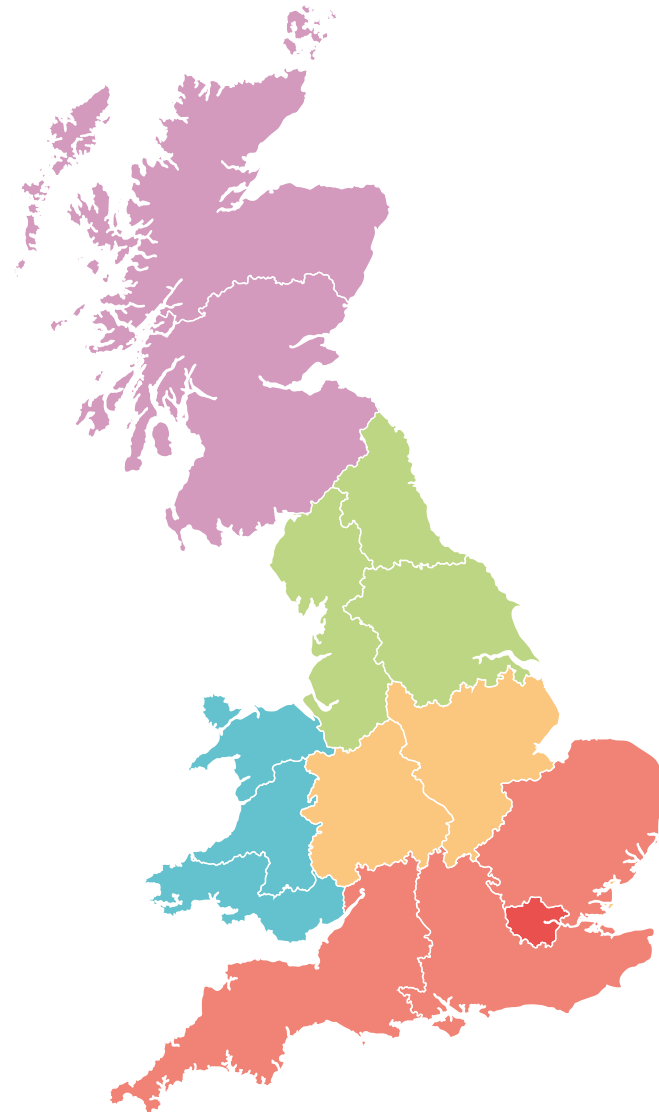
Workstream 1:
Energy Consultants and Project Management

- 2015/S 209-379958 London
- 2015/S209-379983 England (Ex London)
- 2015/S 209-379964 Wales

Workstream 2 & 3:
Individual Energy Efficiency & Renewable Measures
Energy Efficiency Measures and Refurbishment

- 2015/S 208-376924 London
- 2015/S 208-376946 England (Ex London)
- 2015/S 209-376934 Wales

- London
- North England
- Southern England
- Wales
- Midlands
- Scotland (SPA)



This workstream operates in Scotland under the Scottish Procurement Alliance (SPA) Energy Efficiency and Refurbishment Framework, please visit www.scottishprocurement.scot for further information.

Workstream 1 suppliers Energy consultant and project management (WS1)

Region	Virtus Consult Ltd	Pellings LLP	Sweett (UK) Ltd
London		✓	✓
Southern England			✓
Midlands	✓		
North England			✓
Wales			✓



JOHN SKIVINGTON
LHC Director

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This all-encompassing framework not only incorporates measures that have featured in previous LHC frameworks, but now includes a specific band for consultancy and project management.

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Workstream 2 suppliers

Individual energy efficiency and renewable measures

Measures key:

- A:** External Wall Insulation
- B:** Cavity Wall Insulation
- C:** Internal Wall Insulation
- D:** Insulation Materials
- E:** Biomass Boilers

- F:** Solar Photovoltaics (PV)
- G:** Air Source Heat Pumps
- H:** Heat Interface Units (District Heating)
- I:** Traditional Boilers (Oil & Gas)

North England

	A	B	C	D	E	F	G	H	I	SMEs
Absolute Solar & Wind					✓	✓		✓		✓
British Gas T/A PH Jones									✓	
Campbell & Kennedy						✓				✓
City West Works			✓	✓					✓	✓
EON Energy Solutions Ltd		✓								
Everwarm		✓	✓	✓		✓	✓			
Insta Group		✓	✓	✓		✓				✓
Mears	✓	✓	✓	✓			✓	✓	✓	
SERS Energy Ltd	✓									✓
Sure Maintenance Ltd								✓	✓	
Thextons Property Services	✓									✓
Turner Facilities Management	✓									
Wates Living Space	✓	✓	✓	✓		✓				

Midlands

	A	B	C	D	E	F	G	H	I	SMEs
A C Whyte	✓									✓
Aaron Services Limited								✓	✓	✓
Anglian Group				✓					✓	✓
Aran Services		✓	✓	✓	✓	✓	✓	✓	✓	✓
British Gas	✓									
British Gas T/A PH Jones									✓	
Campbell & Kennedy						✓				✓
EON Energy Solutions Ltd		✓								
Everwarm	✓	✓	✓	✓		✓	✓			
Insta Group		✓	✓	✓		✓				✓
Mears	✓		✓				✓	✓	✓	
Volker Laser	✓									✓
Wates Living Space	✓	✓	✓	✓		✓				

Wales

	A	B	C	D	E	F	G	H	I	SMEs
A C Whyte	✓									✓
Biofutures					✓					✓
British Gas T/A PH Jones									✓	
Campbell & Kennedy						✓				✓
City West Works		✓	✓	✓					✓	✓
EON Energy Solutions Ltd		✓								
Everwarm	✓	✓	✓	✓		✓	✓			
Mears	✓	✓	✓	✓		✓	✓	✓	✓	
SERS Energy Ltd	✓									✓
Sure Maintenance Ltd								✓	✓	✓
Thextons Property Services	✓									✓
Wates Living Space	✓			✓						

London

	A	B	C	D	E	F	G	H	I	SMEs
Active Energy	✓		✓	✓	✓			✓	✓	✓
Amber Construction	✓	✓				✓			✓	✓
Aran Services		✓	✓	✓	✓	✓	✓	✓		✓
Aspiration Energy										✓
British Gas T/A PH Jones									✓	
Campbell & Kennedy						✓				✓
EON Energy Solutions Ltd	✓	✓								
Everwarm	✓	✓	✓	✓		✓	✓			
Insta Group						✓				✓
K&T Heating								✓	✓	✓
Mears							✓	✓		
Osborne Energy	✓	✓		✓						✓
Polyteck Building Services					✓		✓		✓	✓
Thrift Energy Ltd					✓					✓
Wates Living Space	✓	✓	✓	✓						

South East & East Anglia

	A	B	C	D	E	F	G	H	I	SMEs
A C Whyte	✓									✓
Aaron Services Limited								✓	✓	✓
Active Energy					✓		✓	✓	✓	✓
Aran Services		✓	✓	✓	✓	✓	✓	✓	✓	✓
Aspiration Energy			✓		✓			✓		✓
British Gas T/A PH Jones									✓	
Campbell & Kennedy						✓				✓
Cornerstone	✓		✓	✓						✓
EON Energy Solutions Ltd		✓								
Everwarm	✓	✓	✓	✓		✓	✓			
Insta Group						✓				✓
Mears	✓						✓	✓	✓	
Osborne Energy	✓	✓		✓						✓
Polyteck Building Services					✓		✓		✓	✓
Thrift Energy Ltd					✓				✓	✓
Wates Living Space	✓	✓	✓	✓		✓				

South West

	A	B	C	D	E	F	G	H	I	SMEs
A C Whyte	✓									✓
Anglian Group				✓						
British Gas	✓									
British Gas T/A PH Jones									✓	
Campbell & Kennedy						✓				✓
EON Energy Solutions Ltd	✓	✓								
Everwarm	✓	✓	✓	✓		✓	✓			
Insta Group		✓	✓	✓		✓				✓
K&T Heating								✓	✓	✓
Mears	✓	✓	✓	✓		✓	✓	✓	✓	

All energy measures including refurbishment works – Workstream 3

Region	Herbert T Forrest Ltd	Keepmoat Regeneration Ltd	Lakehouse Contracts	Lawtech Group Ltd	Mi-Space (UK) Ltd	Sustainable Building Services	Willmott Dixon Energy Services Ltd
London		✓	✓	✓		✓	✓
Southern England	✓	✓	✓	✓	✓	✓	✓
Midlands	✓	✓	✓	✓	✓	✓	✓
North England	✓	✓	✓	✓	✓	✓	✓
Wales	✓	✓	✓		✓	✓	✓



NIGEL WILLIAMS
HEAD OF TECHNICAL

“

This is our most comprehensive framework yet, with an excellent mix of specialist SME's and main contractors capable of delivering a wide range of energy efficiency projects.

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Workstream 2
of this framework
gives landlords
the opportunity to
appoint local SMEs
through Individual
Energy Efficiency and
Renewable Measures



**Framework agreement
for Energy Efficiency and Refurbishment:**

Workstream 1 & 3 effective in England and Wales
until 1 March until 29 February 2020

Workstream 2 effective in England and Wales
from 1 June 2016 until 30 October 2020

England and Wales enquiries: 01895 274850

LHC.GOV.UK