

Energy Efficiency Dynamic Purchasing System (EEDPS)



ENERGY EFFICIENCY DYNAMIC PURCHASING SYSTEM (EEDPS)

Contractor Engagement Presentation

Welcome

Programme

Thank you for attending

we are pleased to host this Contractor event today



- About INCIC
- What is the EEDPS
- Contractor, Supplier & Customer Engagement
- What is an Energy Efficiency Dynamic Purchasing System (EEDPS)
- Benefits & Cost of accessing an EEDPS
- EEDPS Set Up and Management Process Flow
- The Plymouth Model
- Invitation To Tender (ITT)
- Provider Registration Process
- TrustMark
- MCS
- Trading Standards Approved
- Warranty
- Complaints Handling
- Questions & Answers

About INCIC

Independence CIC (**INCIC**) is a Community Interest Company.

- The only independent , not for profit **Trading Standards Approved Scheme Operator**.
 - INCIC can provide **Trading Standards Approved accreditation** locally and nationally
 - INCIC focus on improving **consumer protection** and **promoting Micro** and **SME** Contractors
 - INCIC provide **Quality Assurance** through its frame works and intermediate feedback
 - INCIC provide a **point of recourse** for Contractors, Customers and Clients using our scheme
 - INCIC has **Primary Authority** with Bucks & Surrey County Councils
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Contractor, Supplier & Customer Engagement

- The aim of this presentation is to provide an opportunity for you to learn about the EEDPS, what it entails and how it operates
- We encourage you to ask questions and provide feedback on your understanding, experience and needs
- We are holding similar events around the UK for other organisations interested in accessing the EEDPS

What is an Energy Efficiency Dynamic Purchasing System (DPS)?

An **Energy Efficiency Dynamic Purchasing System (EEDPS)** is similar to an **electronic framework agreement**, with two exceptions;

- ✓ new contractors and suppliers (**providers**) can **join at any time** for free
- ✓ it is run as a **completely electronic** process
- The legalities relating to the use of an **EEDPS** come from the Public Contracts Regulation 2015 (PCR15)
- The EEDPS is set up for defined requirements which may be divided into categories of products, works or services

What is an Energy Efficiency Dynamic Purchasing System (EEDPS)?

A EEDPS works in two stages:

Stage 1 - A contracting authority issues a **call for competition** on **Contract Finder** and **Find a Tender**

All providers who meet the standard (pass/fail) Pre-qualification Questions (PQQ), and who are not excluded, must be admitted to the **EEDPS**.

Contracting authorities must not limit the number of providers that may join the EEDPS.

Unsuccessful providers can reapply at any time.

Stage 2 - Once the **EEDPS** is set up, **invitations to tender (ITT) can be sent out** to EEDPS providers in the relevant categories to bid for specific contracts individually.

Providers choose whether to bid for each ITT. A decision not to bid does not affect any future opportunities.

ITT to tender return is normally 10 days.

Bids are evaluated and successful bidders awarded Contracts during Stage 2.

Benefits and Costs of accessing EEDPS

EEDPS benefits to customers and providers (suppliers and contractors)

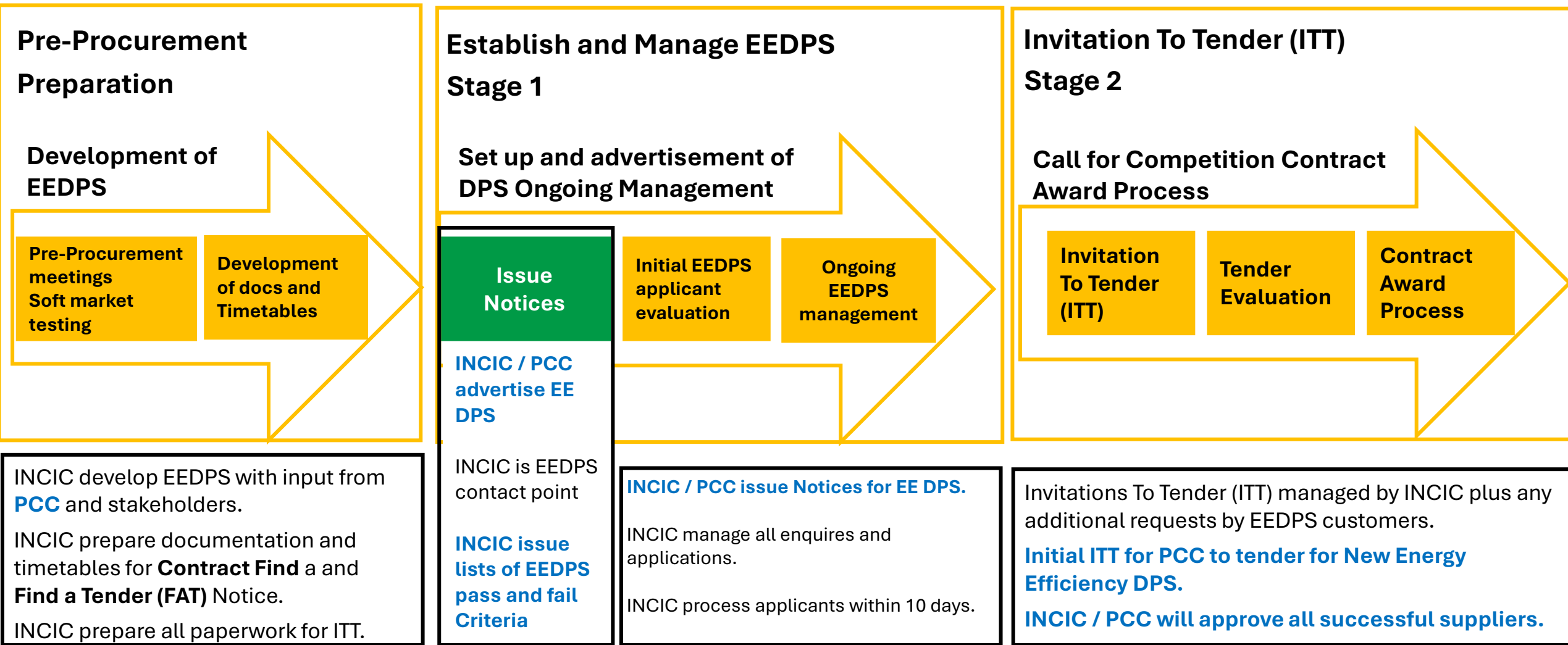
- Use of a **flexible, legally compliant electronic** Procurement solution
- **Cost savings** through economies of scale from **suppliers** engaged with this **UK wide EEDPS** scheme
- Access to a wider pool of **eligible providers**, continuously checked and monitored by INCIC, from the **EEDPS provider list**
- **Cost effective EEDPS Procurement solution** using the '**Plymouth Model**' as framework.
- **Migration of current Procurement system** to the EEDPS managed with the assistance of INCIC who provide the management and administration of the overall EEDPS structure, and all documentation associated with it
- Access to current, **legally compliant documentation, contracts and agreements**

Costs of the EEDPS to Contractors

There is **no charge to Contractors (providers)** who apply to join and are admitted to the EEDPS.

EEDPS Set Up and Management Process Flow

INCIC and PCC are currently working together to establish the EEDPS.
As an illustration, the responsibilities of INCIC and PCC are as follows:



The Plymouth Model

- The **Plymouth Model** for Energy Efficiency works will be used by the EEDPS being procured by **PCC**
- The original Plymouth Model was used by PCC to procure its last bathroom framework. It was simple and effective **cost-plus model**, reducing administration costs whilst providing better outcomes for stakeholders

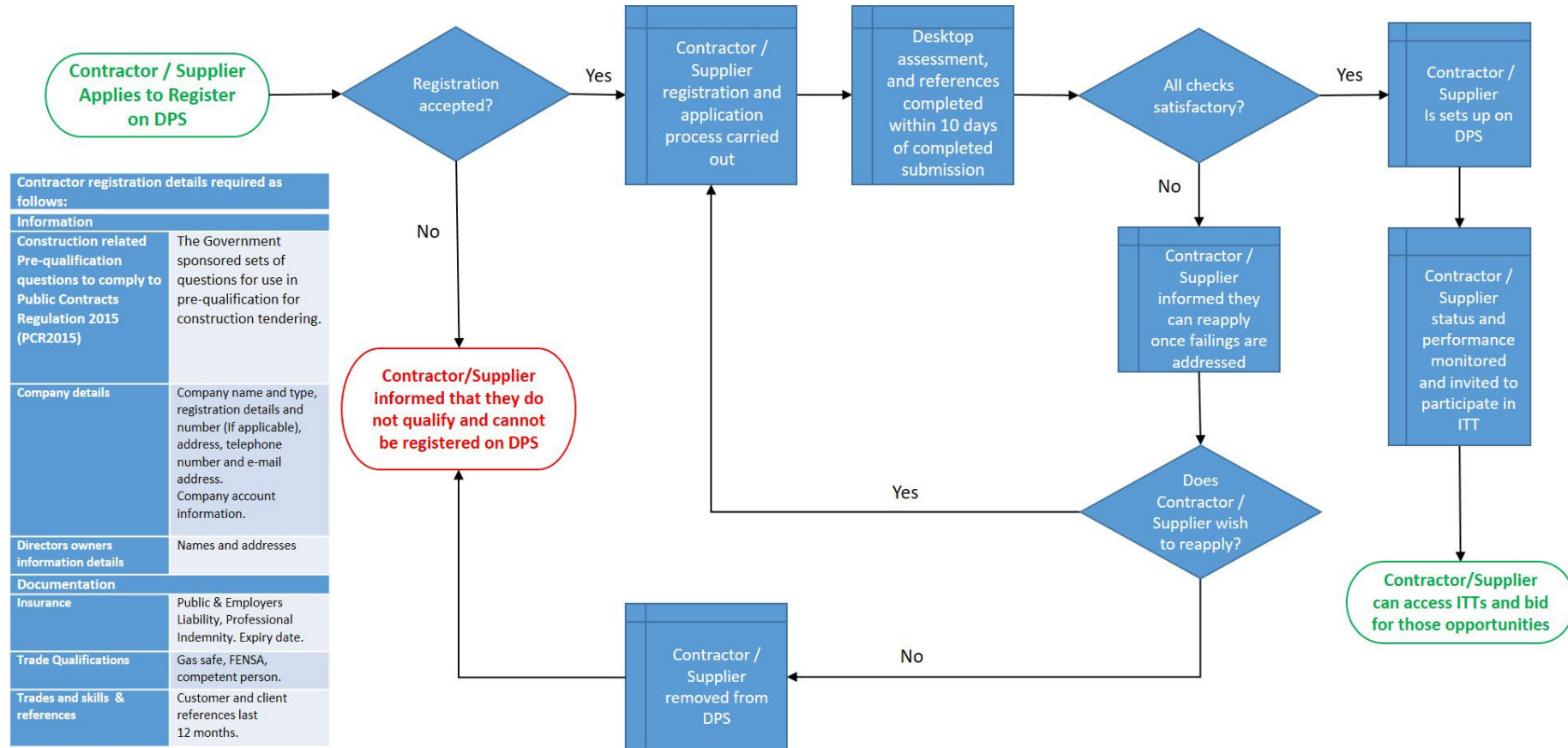
Key Elements

- **Historic data** of spend on adaptations from the previous financial year
- **Schedule of Rates** including time to perform a task and product specification based on the performance required
- **Hourly Rates** based on local trade rates to perform task s and historic data
- **Suppliers** provide their best product match and price against the product specification
- **Contractors** accept established trade hourly rates and access Suppliers best prices through the framework
- **Overhead and Profit** added by Customer, normally up to 25%
- **Selection** based on criteria laid down on application. Providers (Suppliers and Contractors) are then selected

Invitation to Tender (ITT) using The Plymouth Model

- Once Providers have gone through the pre-qualification process and been approved onto the EEDPS, each council will then run tenders, based on the Plymouth Model, supported by INCIC through their systems
- The outcome of the tender process will establish a list of approved Providers for each council, with agreed schedule of rates and prices
- This arrangement will be in a place for a period of time, to be agreed, and contracts will be established with these Providers. The call-off from the list of Providers will be on the current selection basis
- The specifications, performance indicators, management and presentation of documents will be standardised. In addition, each authority will also set out their specific requirements on Contractor selection e.g. geographic locations, number of Contractors required, etc.

Provider Registration Process for EEDPS





- **TrustMark:** Ensures high standards in workmanship, technical ability, and customer protection.
- **PAS:** Sets standards for energy efficiency measures (EEMs) in residential retrofits.
- **PAS 2030:** Demonstrates company procedures, standards, and competencies for EEMs.
- **PAS 2035:** Enhanced version requiring a Retrofit Coordinator to create property improvement plans.
- **TrustMark Framework Operating Requirement (FOR):**
Mandatory framework for tradespeople performing energy efficiency work.

Together, TrustMark and PAS ensure high-quality, reliable home energy improvements.

MCS

- **Microgeneration Certification Scheme**
- **A quality assurance scheme that certifies microgeneration installations and installers**
- **Certifies products and installation companies for small-scale renewable energy technologies, such as solar PV, biomass, wind, and heat pumps**
- **Ensures that products and installers meet industry standards and regulations**
- **Helps consumers have confidence in the quality, performance, and safety of their microgeneration systems**

Trading Standards Approved

Business that have been vetted and approved by a Trading Standards



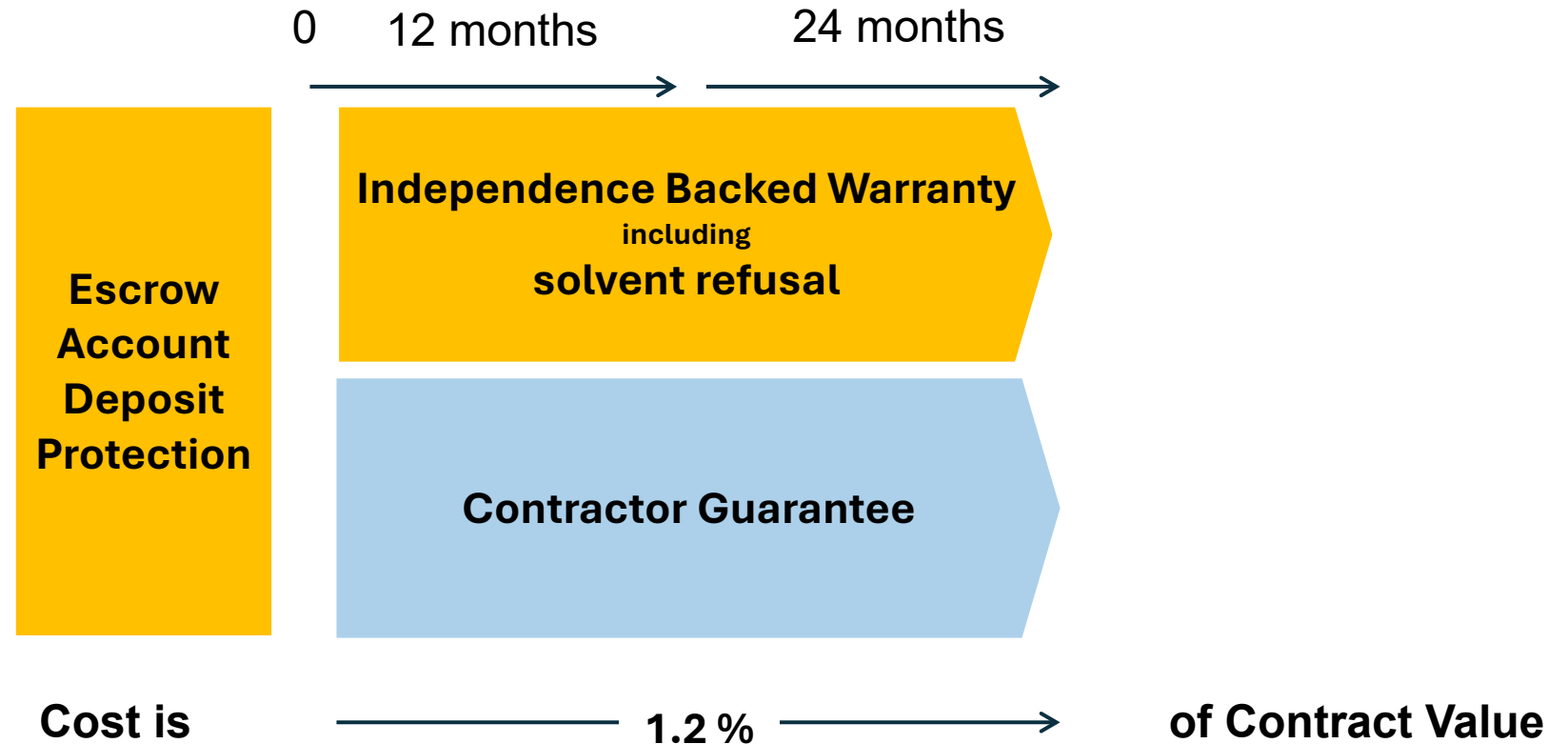
- **Vetting process:** Businesses undergo a thorough check by Trading Standards to ensure they meet the necessary criteria required to become approved.
- **Consumer protection:** This accreditation indicates to consumers that they can trust the business to operate ethically and provide good service, minimising the risk of scams or unfair practices.
- **Local authority involvement:** Each local authority may run their own "Trading Standards Approved" scheme, often with a specific logo or branding to identify participating businesses. UK Trading Standards Approved (UKTSA) provides a minimum national recognised logo with minimum required standards to be met.
- **Mediation and Alternative Dispute Resolution (ADR):** INCIC & UKTSA works with Kent County Council Chartered Trading Standards Institute (CTSI) approved Service when needed to help resolve customer and client disputes.

Warranty Structure

Subject to:

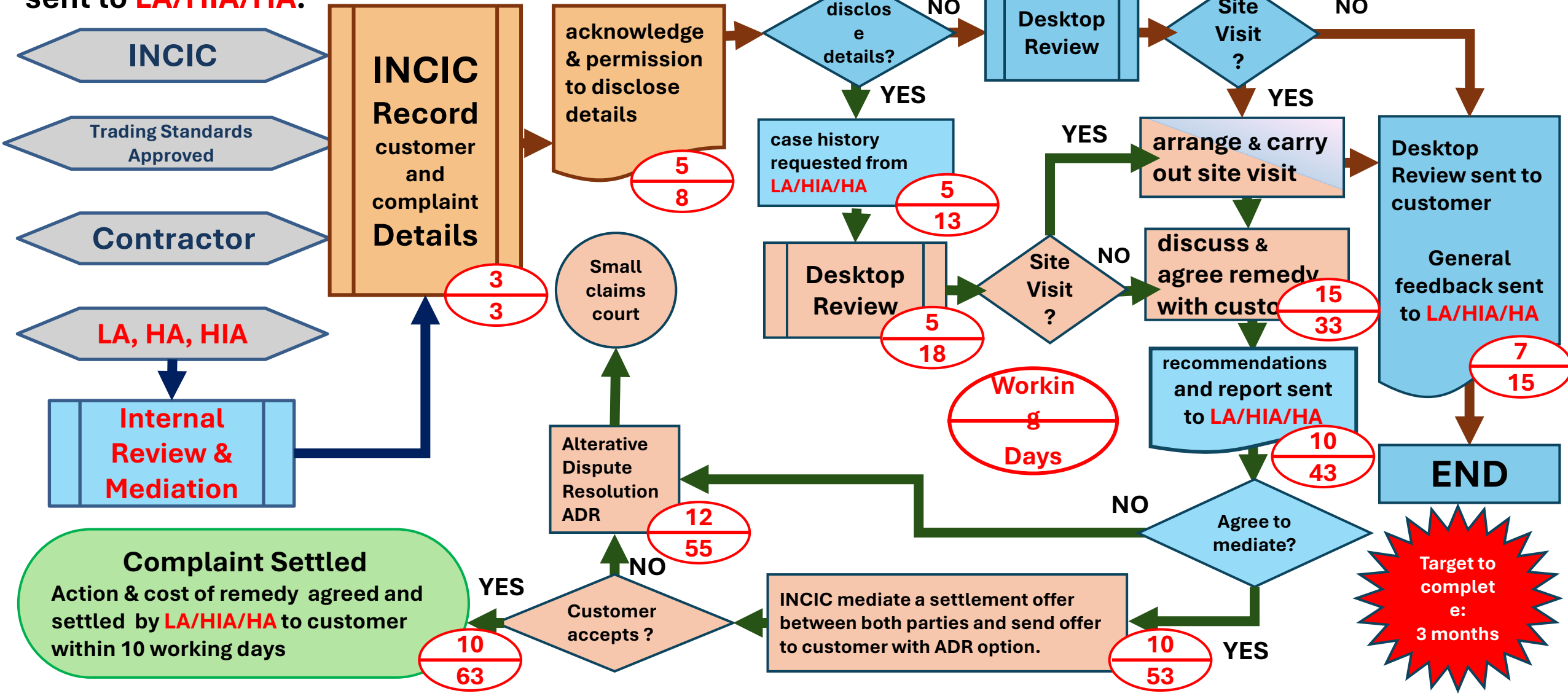
- No Minimum Cost
- Admin fee of £10 per Job
- Appropriate technical and sign-off standards

**Longer Warranty maybe required for some works under some grant conditions*



Complaints Handling Process

Customer Complaint
sent to **LA/HIA/HA**:



Access Agreements

DYNAMIC PURCHASING SYSTEM (DPS) ACCESS & SERVICE AGREEMENT

THIS ACCESS & SERVICES AGREEMENT ("Agreement") is entered into on

The Day of 2017

Between:

NAME OF CUSTOMER

OF:

(hereinafter called the "Customer")

And

INDEPENDENCE BROKERAGE SERVICES CIC

a company and having its registered office at: Chislehurst Business Centre, 1 Bromley Lane, Chislehurst, Kent, BR7 6RH

(hereinafter called the "Scheme Operator")

The Customer and Scheme Operator are collectively referred to as the "Parties" and the "Council" means "Plymouth City Council".

SERVICE

Appendix II

The Scheme Operator will provide all of the following services as laid out in this document for and on behalf of Customer;

Item	Stage	Service Provided by Scheme Operator
1 First Stage		
1	Pre Procurement engagement for the use of Dynamic Purchasing System (DPS), market engagement and marketing to stakeholders, contractors/suppliers (providers).	Carry out all pre procurement market engagement activities prior to and during procurement.
2	Provide time table and duration of procurement of DPS.	Provide time table for procurement and duration of DPS.
3	Pre Procurement communications and engagement with stakeholders (both internally and externally) including potential contractors/suppliers (providers) to DPS.	Provide all channels for communication and engagement for and on behalf of DPS and the customer, with all stages of procurement including organising venue, guidance and how to apply to join the DPS.
4	Develop documentation.	Compile documents in an OJEU compliant way. This will include all terms and conditions, DPS docs, pre-qualification questions and the evaluation criteria, guidance to suppliers for admission to DPS, access agreements and Pass/Fail Criteria as well as notifications. Draft OJEU suitable for a DPS, any specific lot structures and values. (All corporate customers of DPS to be listed on Scheme Operators website once signed agreed Terms and Conditions of DPS).
5	Issue and advertise OJEU Notice	Plymouth City Council (Council) will issue OJEU notice and use Contracts Finder to launch documentation and the scheme operator will capture responses and provide clarifications for providers to Dynamic Purchasing System (DPS).
6	The Provision and ongoing management and evaluation of new entrants to DPS, Contractor/Supplier (Providers) List.	Process all applicants for the DPS and provide ongoing administration maintenance (addition of new providers etc.) within 10 days of their submission after initial 30 days of issuing of advertisement in OJEU.
2 Second Stage		
1	Invitation to tender (ITT)	Notification and management of Tender invitations for relevant categories utilising Plymouth Bathroom Framework Model (PBFM), ensuring compliance to Procurement Contract Regulations 2015 (PCR 2015) as required.
2	Provision of documentation	Provide all updated documentation, in line with PCR2015
3	Tender evaluation	Undertake and provide evaluation and summary for Plymouth Model to customer.
4	Contract Award Process	Compile award recommendation and notify successful/unsuccessful suppliers.
5	Check all Contractors and Suppliers are appropriately accredited prior to set up of the DPS and ongoing.	Make sure all contractors and suppliers are appropriately accredited to provide supplies and carry out works on an ongoing basis.
6	Ongoing management and price control	Provide mechanisms to manage and mitigate price rises and providers services.
7	Calculation of Fee	Calculating and managing of management fees.

- Customers and Providers are required to sign an Access Agreement to use the EEDPS
- The Access Agreements lays out T&Cs of the Agreement and the Customer provides projected annual spend. Providers agree to abide by the T&Cs
- The Appendix lays out the requirements and services INCIC will provide to the customer
- The Provider agrees to the Appendix

Questions & Answers

Your questions are invited