

Technical Specification

For the Provision of Maintenance Services Issued by

Worcestershire Acute Hospitals NHS Trust

Tender Reference Number: LGM37200

Maintenance Contract

For the provision of Passenger Lift Maintenance Services

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Introduction

This document provides full details of the Client's requirements for the provision of maintenance of passenger and good lifts.

You are required to complete all sections in the accompanying Invitation to Tender response document (ITT) and provide pricing in the accompanying Pricing Schedule.

All equipment is to be maintained in line with the following Specification.

Please note any bids received that deviate from any aspect of this Technical Specification will be classed as variant bids, and bidders may be excluded from the procurement process.

Contract Overview

Worcestershire Hospitals is seeking to contract for the provision of a service to ensure the Clients current equipment is kept in a safe and reliable working order and operating in a way that provides the optimum efficiency.

The Client has six principal requirements:

1. To carry out planned preventative maintenance with a minimum of non-planned downtime and breakdowns.
2. To maximise the life expectancy of the components which make up the lifts.
3. To ensure the continued safety of the lifts.
4. To ensure reliable operation of the lifts.
5. To preserve ride quality on lifts.
6. To maintain cleanliness in all areas inaccessible to non- lift industry trained staff i.e., lift shafts, pits, car tops and machine rooms.

Level of Cover

The successful contractor will be required to price to provide a service in accordance with manufacturer's recommendations, LOLER, SAFed, HTM 08-02 and the requirements set out in this Technical Specification.

This contract will be awarded on a Planned Preventative Maintenance (PPM) basis. Works outside the PPM schedule up to the value of £1,000.00 can be carried out without written sign off from the Client, these include reactive repair work, repair work following misuse, agreed works following dilapidation audit. A call-off order will be raised for work which falls outside the PPM schedule, to be invoiced against when necessary. This is to minimise lift downtime. To confirm this contract will be awarded on a Planned Preventative Maintenance (PPM) basis.

It is essential that all aspects of this technical specification are adhered to during the contract period. It is imperative that safety measures are carried out during servicing of the equipment to comply with the Trust's safety requirements.

The Trust reserves the right to delete from or add to this program such equipment as may be dictated by circumstances. This shall include any equipment that has inadvertently been missed from the maintenance program.

Out of Hours Maintenance

The Contractor shall at its cost perform maintenance in off peak hours on units identified elsewhere in this Scope.

Units requiring work in off-peak hours shall have maintenance performed between the hours of 08.00 and 16.00 hours during Saturday and Sunday only. Where maintenance routines dictate a longer downtime, prior permission of the Service Manager must be obtained 14 days before work commences, except in the case of loss of service.

Lots

This contract will be awarded in a single lot and will be awarded to one contractor. This is to reduce the risk of conflict between multiple contractors and reduce contract management and administration costs.

Contract Period

The contract will be for three years with the option to extend for two further twelve-month periods, subject to the satisfactory performance of the contractor. The contract will commence on 01/07/2024.

Working Hours

Normal working hours are 08.00 – 16.00 Monday to Friday.

Location and Sites

During normal working hours, ensure all engineers report to the Estates Department at each site to obtain a permit if necessary.

Name of each site where the contract will be carried out:

1. Kidderminster Hospital and Treatment Centre
2. Alexander Hospital - Redditch

Response Times to Call-Outs

1. One hour for entrapment
2. Two hours for other breakdowns

Emergency Callout Responsibilities for Entrapment

Outside of normal working hours 08.00 – 16.00, the following applies:

In the case of an emergency or an entrapment the AutoDial in the lift must be connected directly to the 24/7 emergency contact provided by the contractor. The call handler will obtain all necessary

information from the caller using the AutoDial, dispatch an engineer to site and report the incident immediately to the client.

Estates and Facilities team to mobilise trust staff personnel to respond immediately to the lift location for support.

In the event of an entrapment in which the Contractor fails to achieve the specified response time, the Trust may, at its discretion, employ any other means at its disposal to carry out release procedures. The Trust would expect the contractor to support the Trust to ensure passenger safety.

‘Other means’ shall include but not be limited to:

- Emergency services
- Other Lift Contractor

The use of ‘other means’ will be restricted to the release of entrapped passengers. The contractor shall still retain responsibility for the reinstatement of the equipment to a full and reliable service.

Emergency Callout Responsibilities for Breakdown

The Estates on-call Manager will contact the Lift Contractor and request engineer attendance. They will instruct the on-call Craftsman to liaise on site with the lift engineer.

On receipt of a call, the Contractor shall confirm to the caller the estimated time of arrival of their engineer. Where there may be a delay in the arrival time, the Contractor shall maintain an update with the Premises Representative or reallocate the call to ensure another engineer can attend in the required timeframe.

The specified response times must be achieved 365/6 days per annum.

Contract Requirements

The Lifts covered by this Contract should be maintained so they are in a good working order, in accordance with the Lift installer’s/modifier’s and/or Original Manufacturer’s instructions as defined in BS EN 13015 and best industry practise.

The successful Lift Contractor shall ensure that all relevant works, as detailed and advised by the Lift and Escalator Industry Association (LEIA) in the form of Technical Bulletins/Safety Notifications, are reported to the Trust. It shall be the Lift Contractor’s responsibility to ensure such works are implemented and that evidence of any resultant remedial action is recorded in writing and placed in the Health & Safety file.

Lifts that have been subject to modernisation should be maintained in accordance with the installer’s/modifier’s instructions for the replaced components.

Planned preventative maintenance

1. Breakdown attendance and reinstatement
2. Reactive maintenance

3. Corrective and emergency inspection
4. Test and repair each of the units as set out in line with all statutory regulations, for the equipment outlined in the accompanying pricing schedule.
5. Trust to agree a floating stock of consumables, as agreed with contractor on award of contract.
6. The service includes all labour and consumables for all PPM visits, **except for those specifically excluded**, together with all tools, plant and access and lifting equipment required to provide the service.

The following is excluded from the Contractor's responsibility and maintenance, except where damage is as a direct result of the Contractor's negligence in the performance of its duties, or equipment design.

1. Decorative finishes of the car enclosure, car, and landing entrances, except where damage is a direct result of poor adjustment
2. Buried piping on hydraulic lifts
3. Any modification to the lift equipment carried out by 'others' during the term of the Contract, whether mechanical or electrical
4. The incoming main power supply cable to both power and lighting circuits, in connection with the lift installation
5. The effects of fire, flooding and the restorative works as a consequence thereof.

Contractors Responsibility

Included in the Contractor's responsibility will be the correct adjustment, repair, and/or replacement where conditions warrant, of all parts of the lift equipment not excluded above and including but not limited to:

1. Worm wheels
2. Worm shaft
3. Stress bearings and oil seals
4. Suspension ropes and safety ropes
5. Governor ropes
6. Guide shoes
7. Brake magnet coils
8. Brake linings
9. Lift motor and generator
10. Gear box oil
 - a. Hydraulic oil
 - b. Hydraulic oil coolers or equivalent, plus all associated operating systems
 - c. Hydraulic valve blocks and main piston seals
11. Motor and general brushes
12. VVAC and VVVF drives and speed regulator systems including regenerative drives
13. Door operators and associated drive systems
14. All wiring from the main isolator to the lift
15. Travelling flexible cables
16. Selector tape or chain drives where applicable

17. All controller components and their associated parts including PCBs, microprocessors and frequency drive units
18. Limit switches and shaft positioning equipment
19. Conductors and indicators
20. All indicator lamps, both in the lift car and on the landings
21. Car, motor room and lift shaft lighting, plus any aesthetic lighting to scenic lift cars
22. Cleaning of all lift equipment in the machine room, lift shaft, pit and wheelhouse (where applicable). To ensure that the machine room is always kept clean and tidy and free of rubbish and potentially inflammable material
23. Cleaning of the lift shaft and motor room fabric, as well as decoration internally
24. Cleaning of all areas that are only accessible by staff qualified to EOR 202.
25. All emergency lighting in car, shaft, and motor room
26. Any associated monitoring or diagnostics systems
27. Lift alarms, intercoms, auto-dialler, and diagnostic equipment

The Contractor shall provide all cleaning materials and lubricants for the adequate maintenance of the Lift and associated equipment. All lubricants are to comply with the Original Manufacturer's specification and the COSHH regulations

No abnormal stocks of lubricating oil or lubricants of an inflammable nature shall be retained on any Premises at any time.

No material shall be stored within the machine rooms that are not required for the maintenance of that Lift unless prior permission is given by the Trust. Any spares shall be kept in suitable metal cabinets, to be provided by the Contractor.

Entrance barrier guards of safety and adequate design, in accordance with Health & Safety Guidance note PM26 shall be retained on site and placed in front of the entrances whenever the Lifts are being worked on by the Contractor's Engineers.

'Out of Service' indicator notices shall be placed on each landing whenever a lift is removed from service for either maintenance or repair.

The Contractor shall provide all temporary lift frames and gantries required for the removal of equipment.

The contractor is responsible for providing all their own PPE and the subsequent safe and correct disposal.

The contractor is responsible for the correct removal and disposal of any work related materials off-site.

Any reactive work which spans more than one day will be considered as a single job. The Client will only accept a call-out charge on day one. The Client will then be charged the hourly rate for the remaining hours / days to complete the works.

Maintenance Planning – General

The Contractor shall issue an annual maintenance planner detailing the types of visit scheduled during the year which shall also incorporate the hours to be expended at each visit in accordance with the Clauses above.

Following completion of each service the Contractor's engineer will provide a duly checked off, signed and dated form outlining the works completed and time expended, which shall correspond to the above. No changes in the scheduled visit will be acceptable unless previously agreed and confirmed in writing or by Email.

The works to be undertaken on each service visit shall be in accordance with the manufacturer's instructions and / or, shall be planned to meet the five principal requirements previously detailed in the Contract Overview section of this document.

General Correspondence

	General Correspondence	Target Objective
1	Trust requests – reply	24 hrs/Email
2	Programmed Works Confirmation to start (Trust approved)	7 days
3	Annual Planner with 12 months major Repairs issued for 1st January	4 weeks
4	Contractors Audit Schedule Planner	4 weeks
5	Completion and issue of schedule	24 hrs
6	Confirmation of work completed	Refer item 4 above
7	Failure rate analysis	2 days
8	Exception reports/repeat calls analysis	24 hours
9	Incident/Accident – attendance	Same day
10	Incident/Accident – report	24 hrs/ Email

Benchmark Audit

A benchmarking audit, the scope of which is to be agreed between the parties, shall be carried out by the Contractor on each Lift. A separate audit by the Trust or the Trust's representative will be carried out annually as required by HTM08-02. Where Lifts are identified as being below the required standard, the Contractor shall within 10 working days of such audit or receipt of External audit/action Plan, issue a program of works to immediately improve the standard.

Minimum Planned maintenance schedule	Frequency
All Passenger lifts, car park lifts etc Theatre Service Lifts	M
Platform Lifts	Q

Equipment Usage

The Contractor is required to annually evaluate the equipment usage relative to the number of hours allocated to each unit per annum and report findings to the Trust.

The following conditions must be included and stated: Lifts (Maintenance)

	Number of visits	Minimum per annum
1	Passenger Lifts 4 x floors	12
2	Passenger Lifts – low rise	12

Stated below are the recommended Minimum working hours required. These hours are for the servicing 'downtime' per Lift. All setting-up, booking in and travelling times etc. shall not be included in these times. Also, when carrying out the planned works, the engineer will only be allowed to interrupt the programmed operation for attendance to an entrapment, and then only with the approval of the Service Manager or an approved Representative at site. Any tea or lunch breaks are to be scheduled outside of the service operation.

	Number of visits	Minimum per visit
1	Passenger Lifts 4 stops	1 hour 15 mins
2	Passenger Lifts – low rise 2-3 stops	1 hour

Obsolescence and Parametric Replacements

The Contractor will identify any parts that are deemed to be obsolete or at risk from obsolescence. The Contractor will identify and provide parametric replacements at its own cost. The Client reserves the right to investigate any claims for obsolescence and the Contractor shall provide all information and research carried out to enable the Client to do so. Where the Client identifies components that could be used as parametric replacements these will be replaced and installed at the Contractor's own cost.

Where a component has been updated or improved and is a replacement for an existing component this will not be deemed an upgrade or obsolete part replacement. Electrical wiring changed for these replacements or fixing alterations will be completed at the Contractor's own cost.

Solid state items such as drives or controllers PCBs that are deemed obsolete but can be repaired by a recognised specialist repair company shall be repaired at the Contractor's cost.

Lift Communication System/Autodiallers

The Contractor will survey each unit and inform the Service Manager if the hands-free communication system installed is able to be transferred to an alternative call centre. In the event of the above being

not technically achievable the Contractor shall provide technical and installed cost details of BS EN81-28 four-way emergency communication systems.

The Contractor shall include to re-programme the auto-dialler units to the Contractor's emergency number (where they permit) this needs to be carried on the first day of the contract – 01/12/2023.

Two-way voice links are to be costed for original replacement and a general cost to be provided per unit. The Contractor shall determine the type of communication equipment installed per unit. The Contractor shall provide an inclusive replacement cost where equipment is under Contract. This will be submitted with the returned tender and documented in the accompanying pricing schedule.

Voice Communication

Where Lifts are fitted with voice communication equipment to contact the Hospital switchboard, the monitoring, maintenance, repair and checking of this equipment shall be included within this Contract by the Contractor.

System Operating

The Contractor shall create copies of software and firmware (including EPROMS, E²PROMS and NVRAM's) for drive and logic controls incorporating such technology. The software shall be used by the Client exclusively as emergency back-up data for the equipment in this contract. The Contractor shall transfer the data to an equivalent I.C. device as the origin I.C. and shall record; unit reference, PCB reference, I.C. reference and software reference for each device. The I.Cs along with the record information shall be housed in a tough static free I.C. box or boxes and handed to the Client on completion not later than three months after the Starting Date of the Contract.

The Contractor shall obtain and maintain passwords for each controller requiring password access to set-up and monitor menus. Passwords are to be recorded and passed to the Service Manager, not later than three months after commencement of the Contract. The Service Manager is to be notified of any password change.

Spares

The Contractor shall be responsible for providing sufficient tools, 'test and diagnostic instruments', equipment, lubricants, cleaning materials and spares necessary for the efficient maintenance, diagnosis and repair of the equipment, and where applicable, to comply with all relevant makers instructions of recommendations.

The Contractor will provide an inventory of existing site spares the Client has previously purchased in the first week of the start date of the contract. The Contractor will allow to update the inventory when new spares are purchased by the Client. Site spares are to be used strictly for the sole purpose of the Client's requirement. The Contractor shall record when a spare part is used, the date of when the spare part was ordered for re-stock and the date when the spare part has been delivered.

The inventory records will be kept in a specific plant/machine room to be agreed locally with the Service Manager, copies of all documents will be provided for the Service Manager and subject to audit from time to time.

Within one month of the starting date the contractor will provide a cost option and lead time for providing its recommended critical spares per site.

Drawings

Record drawings that exist will be available in plant rooms or with the Service Manager. When any Service(s) and or work is undertaken that alters the base drawings the Contractor shall modify the drawings as appropriate.

The Contractor shall allow for providing copies of original drawings and updating them. The Contractor shall provide three print copies of complete plasticised electrical schematic drawings for use in each plant room.

The Contractor shall update drawings to reflect all actions taken on site during the period of the Contract and provide copies of all manufacturers' literature that is necessary.

Statutory Regulations

All work undertaken as maintenance must comply with OEM recommendations and British Standards BS 5655 Parts 11 & 12.

Codes of Practice for the modification of electrical and hydraulic lifts.

Must conform to, UK Acts and Regulations:

The BS EN 81 series of current Standards whether "designated" or not.

All works and equipment shall comply with relevant statutory instruments and regulations and with, but not limited to, the following:

1. Regulations under the Offices, Shops & Railways Premises Act;
2. Regulations under the Electricity Acts;
3. The Health and Safety at Work Act;
4. The Management of Health and Safety at Work Regulations;
5. The Regulatory Reform (Fire Safety) Order;
6. The Equality Act;
7. Data Protection Act;
8. The Control of Noise Regulations;
9. The Building Regulations;
10. The Electricity at Work Regulations;
11. The Supply of Machinery (Safety) Regulations;
12. The Lifts Regulations;
13. The Work at Height Regulations;
14. Lifting Operations and Lifting Equipment Regulations;
15. The Provision and Use of Work Equipment Regulations;
16. The Control of Substances Hazardous to Health Regulations;
17. The Control of Asbestos Regulations;
18. The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations;

19. The Workplace (Health Safety and Welfare) Regulations;
20. The Manual Handling Operations Regulations;
21. The Confined Spaces Regulations;
22. The Control of Vibration at Work Regulations;
23. The Personal Protective Equipment at Work Regulations;
24. Construction (Design and Management) Regulations;
25. The Housing Grants, Construction and Regeneration Act;
26. The Health and Safety (Safety Signs and Signals) Regulations;
27. The Environmental Protection Act;
28. The Waste Electrical and Electronic Equipment Regulations;
29. The Hazardous Waste Regulations;
30. The Waste Management Regulations;
31. Transfer of Undertakings (Protection of Employment) Regulations;
32. BS 7671: Requirements for Electrical Installations – The IEE Wiring Regulations (17th Edition);
33. BS5266-1: Code of practice for the emergency escape lighting of premises;
34. BS 9999 Code of Practice for Fire Safety In the Design, Management and Use of Buildings;
35. BS 7255: Code of Practice for safe working on lifts;
36. BSEN 13015 Maintenance for Lifts and Escalators – Rules for Maintenance Instructions;
37. Health Technical Memorandum 08-02: Lifts.

Compliance with Regulations

The Contractor shall comply with Kidderminster and Alexandra Hospital Safety Rules for the respective site or premises, a copy of which may be obtained from the Estates Manager of each premises to establish the onsite system of working which is safe for its own employees and for all other persons on or near the site or premises.

The Contractor shall comply with all Statutory Regulations, Local Authority By-Laws.

The Contractor shall comply with all NHS Trust Codes of Conduct and behaviour.

Suitability of Materials

The Trust's decision on the suitability of materials used shall be final.

Asbestos

Certain areas of site may have asbestos which has been identified by survey and either removed or made safe. The Contractor shall ensure their employees and their Sub-Contractors employees are aware of all duties under the Control of Asbestos Regulations. A copy of the site asbestos register and management plan will be made available to the Contractor. The Contractor should assume that asbestos is present in its working areas unless advised otherwise.

The Contractor must advise the Service Manager immediately if they suspect the presence of asbestos or asbestos related materials and is prohibited from carrying out works involving handling, removal, cutting, drilling, breaking or abrading materials containing, or suspected of containing asbestos. Except

in the case of permitted works and the contractor is trained to do so. The Contractor shall be fully responsible of any consequential loss, damage or delay caused by its incorrect handling of asbestos.

General Working Conditions

The Contractor shall employ, on this Contract, only engineers fully trained and of sufficient breadth of knowledge and experience to cope with the level of expertise which will be required in maintaining units of different design and manufacture.

All staff should be competent and be suitably qualified in-line with HTM08-02: Lifts (2016 edition). Specifically, Clause 3.14 states that 'a competent person (lifts) is a person, suitably trained and qualified by knowledge and practical experience, and provided with the necessary instructions to enable the required work to be carried out safely (from BS7255)'. The Contractor shall provide evidence of training for all staff attending site on request.

The Contractor is to provide sufficient staff to carry out work on lifts in accordance with Method Statements and Risk Assessments specific to the contract requirements. Where additional staff are required, then new Method Statements and Risk Assessments are to be submitted prior to works commencing.

The Contractor shall only provide directly employed operatives to execute the Work and shall not sub-contract the Works nor use operatives provided by third parties, without the approval of the Trust's representative.

LOLER Thorough Examination of Lift

A 'Competent Person' nominated by the Trust will carry out the periodic statutory inspections of the Lifts.

Where the LOLER Report identifies any remedial work, which falls within the scope of the Contract, the Contractor shall attend site and carry out the works; to be signed off and written confirmation issued. Service Manager to explain why the work was not carried out in the service visits and offer assurance to avoid it being missed in the future.

If for any reason any of the remedial works cannot be completed immediately the Contractor shall inform the Trust or Trust's Representative to advise of the earliest date by which all Works will be completed.

If, because of the Statutory Inspection, an 'Immediate Defects Report Notice' is issued, the Trust or Trust's Representative will, without delay, advise the Contractor, who shall arrange for immediate action to be taken and the required remedial works to be completed under the Contract. Where the works fall outside of the contract the Contractor shall issue to the Trust a fixed price quotation based upon the rates in the Schedule detailed in the pricing schedule. Under these circumstances the remedial works shall be completed with the utmost expediency, irrespective of any notice period specified. Any remedial works shall be completed within the time scale stated on the Notice. In any case, no works shall be allowed to remain incomplete after 30 days following receipt of Notice.

On completion of any work resulting from an 'Immediate Defects Report Notice', the Contractor shall advise the Trust, or the Trust's Representative, in writing within 24 hours of completion of the Works.

This notification of completion of Works shall also include a schedule of repairs/adjustments carried out and signed off.

If the LOLER Report identifies non-immediate work, which is outside the scope of the Contract, the Contractor shall, on receipt of the report, submit a quotation for the Works within a period of 7 days. Quotations shall include details of costs and program for on and off site work.

All quotations shall be accompanied by a detailed Contractor's program and submitted on a fully fixed price basis open for acceptance by the Trust for an eight-week period.

If the quotation is accepted, the Trust will issue an order from which the Contractor shall prepare materials and allocate the labour.

* The Trust reserves the right to obtain alternative quotations, which may result in the employment of other Contractors to carry out the work.

The Contractor shall commit to achieving the dates for remedial works and reporting detailed above. If the Contractor persistently fails to achieve the dates, the Trust reserves the right to terminate the agreement in part or whole as detailed in the terms and conditions.

LOLER Report

	LOLER Report	Target Objective
1	Received and acknowledged	24 hrs. (Requires electronic system)
2	Maintenance items (not misuse etc.)	1 Month/Email
3	Time sensitive Defects Report Notice	Immediate
4	Confirmation of Works Completed	24 hrs./ Email
5	Works outside of contract, quote received. 24 hrs	24 hrs./ Email Standard pricing

Protection, Damage to and Reinstatement of Existing Services

Live services exist on site and shall be maintained throughout the duration of the Contract in operating conditions.

The Contractor shall check for the existence of services (gas, water, electricity, telephone and other communication lines and drains) and similar items, whether overhead on or in the walls or in the floor around the Works and locate and mark to protect the existing services from damage. Any damage to services caused by the negligence of the Contractor shall be made good to the satisfaction of the Trust by the Contractor at the Contractor's expense.

The Contractor shall not interfere with the operation of existing services without permission of the Trust and if applicable, Statutory Authorities and private owners.

Any damage to services caused by the negligence of the Contractor shall be made good to the satisfaction of the Trust by the Contractor at the Contractor's expense and the Contractor will indemnify the Trust in

respect of any consequential loss that may be suffered by the Trust and/or third parties because of any damage to services caused by the negligence of the Contractor.

Materials and Workmanship

The whole of the Works shall comply with all applicable Regulations and shall be executed with all due skill and care and in accordance with the style, character, and finish of first-class work, with the best workmanship and in conformity with the latest relevant Codes of Practice.

Materials shall be the best of their respective kinds and shall be fit for purpose, irrespective of trade usages and descriptions. All materials shall be to the approval of the Trust and obtained from manufacturers approved by him and shall conform to the latest British Standard.

The Contractor shall provide all materials for the Works, either by purchasing from the original Manufacturer or from alternative suppliers. Where alternative sources of materials are considered, these must provide an equivalent or superior performance.

Induction Course

All operatives of the Contractor and their Sub-Contractors are required to complete a health and safety induction course run by the Client before undertaking any work in the Sites. The Contractor is to allow for all operatives as necessary, to complete a health and safety induction course. The Contractor will furnish the Client with all names of personnel required to work at the particular Site during the setting up period.

Safety, Health and Welfare

The Contractor shall comply with all applicable health, safety and welfare measures required under or by virtue of provisions of any enactment or regulation.

The Contractor shall comply with working rules for the areas as agreed by the National Joint Trust for the Building Industry.

The Contractor shall keep the Premises free from rubbish and debris and maintain them in a tidy condition to the satisfaction of the Trust, or the Trust's Representative. All old parts and rubbish shall be removed from the Premises.

The Contractor shall ensure that all of the Contractor's Personnel when working on any of the Premises shall comply with the Trust's health and safety and security policies and any other policy or procedure that may apply in respect of those Premises (the 'Trust's Policies') and, in addition, shall comply with the reasonable instructions of the Trust when present on the Premises. Any member of the Contractor's workforce engaged in an unsafe practice, using unsafe equipment, or engaged in any other practice in breach of Health & Safety at Work Act 1974, or the Trust's Policies or Contractor's Health & Safety Policy, will immediately cease such practice when instructed to do so by the Trust or its appointed representations, but this Clause does not impose any obligations upon the Trust in this respect.

If the Contractor is of the opinion that any of the Lifts is or is likely shortly to be in a dangerous condition, then they shall immobilise the unit temporarily and/or take such other temporary measures that are in

the circumstances necessary and safe, provided that at that time they notify the Trust's representative by telephone immediately, then by email within two hours. Full details and reasons for the action that they have either taken or is recommending being taken must be given in the first instance by telephoning the Trust's representative.

The Contractor shall comply and secure compliance by its workmen, sub-contractors, agents, and servants, with the Health & Safety at Work Act 1974, including any amendment, all regulations and orders made and any subsequent legislation.

The Contractor shall comply with all safety requirements and procedures, which apply to the location at which service is to be provided or those that may be required of the Contractor by the Trust's Representative. It is the responsibility of the Contractor to familiarise themselves with such requirements and procedures and ensure that all their employees comply with them.

The Contractor shall comply with any Health & Safety and Environmental standards and guidelines detailed by the Trust and detailed in the Contractor's own Health & Safety policy. The Contractor shall be registered as a member of the 'Safe Contractor' scheme.

Breakdown Performance

'Breakdown' in respect of any Lift shall mean any failure resulting in any loss of use of the Lift by the Trust or its stakeholders, unless misuse, abuse, or regular planned maintenance causes this.

The contractor shall ensure all repairs are carried out as quickly as is reasonably practical and to make all efforts to keep communication streams with the Trust open and informed of all developments which relate to the speed of the repair.

Audits and Inspections

Regular inspections and auditing of all units for quality of maintenance and safety standards by the Contractor's supervisor must be carried out. During such visits, the Contractor's designated Manager who shall sign the Lift logbook in the machine room space to indicate the visit has taken place.

The Contractor's designated Manager shall also provide details of all visits undertaken during the previous month to the Key Account Manager so that this can be highlighted to the Trust at the regular meetings.

On an annual basis during the third quarter of each contract year, the Contractor shall submit an audit report for each building to the Trust covering the following on a per Lift basis:

1. Risk Assessment of each installation (EN13015)
2. Details of any repairs covered by the Contract but not yet completed and a program listing the completion date
3. Details of the door retaining system – see final paragraph of this page
4. Suggested improvements to provide improved reliability and/or performance

Items (2) and (4) are to include indicative costs.

At commencement of the contract and thereafter on an annual basis, the Contractor shall provide and maintain in each machine room, machinery area or at an agreed location with the Trust: -

1. A 12-month annual planner detailing each proposed maintenance visit and type of visit, plus any major repairs of eight hours or more.
2. A site log card clearly identifying each event and its relevant report. This document shall identify each unit with the number given in Schedule 8.
3. The approved Annual planned maintenance and major repair schedule as applicable to each unit.
4. Copies of all site visit reports separated into Maintenance visits, call outs and repair reports. At each maintenance visit a checklist of the servicing work completed shall be issued and signed off by the Contractor's Engineer.
5. On a monthly basis, the Contractor shall submit a list of Lifts, which have failed to meet the breakdown performance standards. The list shall be cumulative showing each calendar month and the total for the portion of the year.

At minimum intervals of 12 months the Contractor shall inspect the door retaining system in full compliance with the Health & Safety Executive Operational Circular OC 232/29 requirements. A check shall be made to ascertain the amount of wear, damage to channels, grooves or door guide shoes that might affect safe door operation. A written report shall be provided stating the condition of the door guide shoes and fixings, whether the amount of deflection is considered to be acceptable and whether the door operation is being adversely affected by debris, damage or wear to the door guide shoes or the security of their fixings. This report shall be submitted to the Trust's representative.

In the event that a call-out is deemed to be chargeable the Contractor will inform the Service Manager (or if they are not available the site representative) who will be given the opportunity to inspect and agree the damage, where safe to do so. In any event the Contractor will provide photographic evidence of the damage incurred.

Payment of chargeable Service will not be considered if the Contractor's worksheets are not completed fully. The Contractor should note that acronyms for tasks will not be accepted and it will be assumed that their use constitutes an incomplete worksheet.

The Trust shall instruct their Authorising Engineer on an annual basis to carry out an appraisal of the lift condition and lift maintenance standards and issue a written report to the Trust. On receipt of the report the Trust lift Authorised Person will share the report with the lift maintenance contractor and arrange a meeting to discuss the findings and create an action plan for any non-conformances found.

Dilapidation

On an agreed date, convenient to both Trust and Contractor prior to contract start, the Trust and/or its Authorised Representative, will carry out an audit survey on the maintenance standard of the Lifts.

The results of this inspection will be measured against an agreed benchmark installation and any shortfalls will be identified to the Trust.

The Contractor will have the opportunity to be present during the examination, following which a program of work is to be issued detailing the downtime involved to complete the rectification of items

identified. These works must be carried out before the date for completion of the Term, or, where this Contract is terminated earlier, within three months of the date of such termination.

Failure to do so will evoke an automatic three-month extension of the servicing arrangement at no cost to the Trust.

Works carried out following agreement of the findings from the dilapidation report will be chargeable to the Trust, based on the rates quoted in your bid.

Following completion of the works, written confirmation is to be issued and signed by the Contractor's responsible Director stating that final quality check has been completed, plus the date of examination.

Reliability

The Contractor shall plan and carry out usage based preventive maintenance of each Lift to ensure the Lift is maintained in a reliable and safe condition. The Contractor shall attend site in accordance with the schedules offered in their tender, which will form part of this Contract.

As part of their tender submission, the contractor shall include the schedule of planned maintenance, which will ensure that all components receive adequate maintenance to prevent breakdowns. The Contractor shall be fully responsible for maintaining the equipment in full working order with the minimum of downtime.

Fault-finding

The Contractor shall make concerted attempts to locate any ongoing, intermittent or latent faults in the Lifts. Multiple log card entries or service visit records showing 'lost fault while testing'; 'working on arrival'; 'out of order' or similar descriptions of failure conditions shall not be acceptable and shall require the attendance of an adjuster, tester or similarly qualified technician grade personnel to determine the root cause of the problem.

Working and Attendance Performance

The 'working hours' shall mean the time the engineer is allocated to complete the work operation; it shall NOT include travelling, booking in, setting up or reinstatement. No agreement will be given to engineers leaving the Premises during their service visit to attend calls unless specifically agreed by the Trust's Representative.

Once the Contract has been awarded, but prior to the Effective Date, the Contractor shall submit for approval a schedule of planned dates when each visit for each Lift will be carried out during the Term (the 'Maintenance Visits'). The Trust reserves the right to re-schedule the visits. On approval of the plan, two sets shall be issued within 28 days.

Maintenance shall be carried out at times on Monday to Friday to be agreed with the Trust's Representative, unless otherwise agreed with the Trust and specified on the individual Premises. Outside these specified maintenance visit periods, the Lifts must be returned to service and be available for normal operating use.

Security and Site Regulations

On each visit, the Contractor shall observe all security Health & Safety or any other agreed arrangements in the Premises, including being aware of fire regulations and emergency/fire exits.

All Contractors to have valid security passes worn visibly at all times.

The Contractor is required to submit during the setting up period certain personal details requested by the Client of all regular operatives likely to be allocated work at the listed Sites. This includes, regular maintenance and breakdown team, back up maintenance and breakdown team, supervisor, salesman, repair team, technician and out of hours breakdown engineers. The operatives granted security clearance at the sole discretion of the Client will be issued with a valid security pass while on the Sites which must be worn and visible at all times.

In Supervised Properties, the Contractor shall report to the Trust's Representative and complete an entry into the Visitor/Contractor sign in record book. Signatures shall be required for any keys allocated for access to plant rooms. On completion of this work, all keys must be returned.

When a lift is unavailable for service due to maintenance or repair, the Contractor shall affix a clearly defined notice adjacent to each landing entrance of the unit. The notice shall be to the approval of the Trust. The notices shall be displayed prior to taking the Lift out of service.

No Lift is to remain out of service for more than one operating day (max. eight hours) without prior notification to the Trust's Representative.

Landing safety barriers are to be supplied by the Contractor and shall be used at all times to ensure safety to other building users. These shall be retained on site. The barriers shall be of a design which locates into the landing entrance and shall be in accordance with requirements of document PM26, Safety at Landing Entrance as issued by the Health & Safety Executive.

On completion of the works, the Contractor shall remove the notice and ensure the area is wiped clean of any marks.

Parking

There is limited onsite parking available for Contractors on a first come first served basis. Alternatively, contractors will park offsite at their own expense.

Contractor's vehicles and personnel must report to the security office or Estates reception. Contractor's vehicles must be clearly identifiable with a company logo or name.

Communications

The Contractor's engineers shall be equipped with a minimum of mobile phone to ensure a prompt and responsive service. The Contractor shall state its preferred methods at the time of Tendering and these may only be changed by agreement with the Trust.

Arrangements for accepting incoming calls at the Contractor's premises must be based on a minimum of two telephone lines, 24 hours a day, 365 days per year, using a 'free phone' telephone number.

Performance Criteria & Performance Maintenance

Equipment performance shall be brought up to its design parameters where possible, if necessary.

The Contractor shall obtain and keep on site in a binder a copy of the original installation test certificate to establish the performance criteria applicable for each Lift.

Where this is not available, the following shall be established and documented in the binder.

1. Levelling accuracy running into each floor from both directions irrespective of car
2. Load
3. Minimum standards

Hydraulic: +/- 10mm

Single speed AC: +/-25mm

Two speed AC: +/- 15mm

All other drives: +/- 5mm

1. Door static closing force in Newtons, must not exceed the maximum permitted in BS EN81-20
2. Door Kinetic Energy in Joules, must not exceed the maximum permitted in BS EN81-20
3. Door opening time (fully closed to fully open) in 5 seconds
4. Door closing time (fully open to fully closed) in 6 seconds
5. Door dwell time 7 seconds
6. Door 'nudging' time Not required Nudging must be disabled on all lifts
7. Acceleration, Deceleration $>0,5$ & $< 1.2\text{m/sec}^2$
8. Jerk rates $< 1.2 \text{ m/sec}^3$
9. Rate speed in each direction (must be within +/- 5% of design speed)
10. Landing Call distribution (on groups of lifts) dispatching shall be adjusted so that each lift in the group is allocated +/- 10% of the mean number of trips for the group.

Where the original criteria may have been altered the Contractor shall adjust to achieve the design requirements.

These criteria shall be checked and, if necessary, adjusted at each Maintenance Visit.

For groups of Lifts, the criteria of each Lift shall be identical to the tolerances laid down above.

During the Term, the Contractor shall ensure that the Lifts perform in accordance with the applicable performance criteria defined above.

These records shall be the Trust's property and must be provided to the Trust at the end of the contract.

Motor or Generator Rewinds, VVVF Drive Repairs/Replacements

It is recognised that due to failure of this nature, prolonged downtime may occur. To expedite these repairs and return the lift to full working order, Motor or generator rewinds/ replacement, rebuilding of

armatures and gearbox or Drive repairs are to be carried out using the contractors chosen specialist or 3rd parties 24-hour emergency facility.

Prolonged downtime is to be kept to a minimum as this portfolio is operational 24 hour a day.

Where a risk is identified of voltages above 50v AC or DC, then a notice should be displayed on the components affected. This will include locks, door operator equipment, car gate switches and hoist- way limits. These are to be identified during the FIRST SERVICE VISIT and actioned as described.

All works should be carried out in accordance with The Electricity Regulations & the relevant HTMs.

Indicative Frequency of Equipment Maintenance

The following outlines the indicative frequency of maintenance visits. The Contractor shall complete the output schedule which must show the frequency the Contractor is proposing to meet the requirement of the service level agreement.

Abbreviations are as follows:

Indicative Frequency = IF Hours = H

Monthly (calendar) = M Quarterly = Q

All times indicated are on a per lift/per visit basis and do not include travelling time to and from the site or the time required for repair or replacement of any component parts and refer to time engaged in applied maintenance only. All reference to doors shall be read as gates for goods lifts or manually operated service lifts.

Documentation Management

The contractor shall supply by means of a procedural document to identify how documentation is to be managed by their employees and their company, this will include as a minimum:

- Log card management
- Service report management and administration, stating how this information will be delivered to the Trust
- Defect notification and delivery of information to the Trust to ensure defects are clearly highlighted and brought to the attention of the Trust delegated manager of lifts
- Records of remedial work, how managed and how presented
- Upon receipt of insurance defects notified by the Trust, how these are managed, how are these rectified and signed off with awareness to the Trust for record keeping

The list above is not exhaustive and is to be supplemented with other required documentation e.g., schedule of site visits, employee CV's, schedule of inspections etc.

Contractual Supplementary Test Requirements – SAFed

All supplementary tests detailed on the tables which span over pages 24 - 26 of this Technical Specification will be included in the contract cost. Additional costs for 'priced supplementary tests' as

detailed on pages 24 - 26 of the Technical Specification will be chargeable. Pricing for these tests must be provided in the ad-hoc tab of the pricing schedule.

The following requirements set out Supplementary Tests that are required (where applicable to the units under this Contract) and are to be undertaken, at the frequency indicated in the table, by the Contractor and allowed for in the annual contract price. The Contractor shall also provide costs for the Supplementary Tests applicable to the units under this Contract.

The Contractor shall provide written reports and test certificates to the Service Manager within seven days of each examination and/or test.

The Contractor shall maintain, in an approved format, on site and off site records of all visits, checks, inspections maintenance procedures, overhauls, tests, etc.

Unit Type	Supplementary Test	Commentary	Certificate Format	Frequency
Lift	Earth continuity	Clause 4.1	Annex A.1	1st year of contract
Lift	Electrical safety devices	Clause 4.2 and Annex A2 & B1	Annex A.2 & B1	Annual
Lift	Terminal speed reduction systems	Clause 4.3 & Annex A3	Annex A3	1st year of contract
Lift	Landing door interlocks	Clause 4.4	Annex A.4	Annual
Lift	Over-speed governors	Clause 4.6 and Clause 4.6.1	Annex B Table 2 and Annex A7	1st year of contract
Lift	Safety gear (All types)	Clause 4.6.2, 4.6.3 & 4.6.4	Annex B Table 2 & Annex A.7, A.8, A9 & A10	1st year of contract
Lift	Energy dissipation buffers	Clause 4.9	Annex A13	1st year of contract. Annual if buffer switches not fitted.
Lift	Suspension system	Clause 4.10	Annex A14	Annual
Lift	Car overload detection device	Clause 4.11	Annex A15	Annual

Unit Type	Supplementary Test	Commentary	Certificate Format	Frequency
Lift	Hydraulic system	Clause 4.12	Annex A16	1st year of contract
Lift	Hydraulic restrictor/rupture valves	Clause 4.12.2	Annex A18	1st year of contract
Lift	Hydraulic system	Clause 4.12	A16	1st year of contract
Lift	Electrical anti-creep device	Clause 4.13.1	Annex A19	Annual
Lift	Mechanical anti-creep device	Clause 4.13.2	Annex A20	Annual
Lift	Low pressure detection device (switch or valve)	Clause 4.14	Annex A21	Annual
Lift	Traction Brake and levelling	Clause 4.15	Annex A22	Annual
Lift	Emergency release/rescue Operation	Clause 4.18	Annex A25	Annual
Lift	Devices relating to restricted headroom and/or pit clearance	Clause 4.18	Annex A25	Annual
Lift	Fire recall function	Clause 4.18	Annex A25	Annual
Lift	Evacuation control	Clause 4.18	Annex A25	Annual
Lift	Firefighters control	Clause 4.18	Annex A25	Annual
Esc	Electrical Safety Devices	Clause 5.4		Annual
Esc	Earthing Continuity	Clause 5.5		1st year of contract
Esc	Auxiliary Brake	Clause 5.6 (b)		1st year of contract

Priced Supplementary Test Requirements

The following requirements set out likely Supplementary Tests required by the Competent Person under their examination regime referencing 'Guidelines on the Supplementary Tests of In Service Lifts' published by SAFed issue 04 June 2020. The Contractor is to provide costs for the Tests applicable to the units under this Contract in addition to the Test costs provided in the Contractual Supplementary Test Requirements.

This is not intended to define the actual request for a specific Supplementary Test assessed using a risk assessment by the Competent Person, but will be used as a pricing guide.

Provide written reports and test certificates to the Service Manager within seven days of each Examination and/or Test.

Maintain in an approved format on site and off site, records of all visits, checks, inspections maintenance procedures, overhauls, tests, etc.

Type	Supplementary Test	Commentary	Certificate Format
Lift	Lift machine – investigatory test (type A)	Clause 4.5, Clause 4.5.1	Annex A5
Lift	Lift machine comprehensive test (type B)	Clause 4.5, Clause 4.5.2	Annex A6
Lift	Automatic power operated doors	Clause 4.17	Annex A24
Lift	Hydraulic cylinders in boreholes or similar locations	Clause 4.12.1	Annex A17
Lift	Car/counterweight balance	Clause 4.16	Annex A23
Lift	Devices to prevent overspeed of the ascending lift carrier	Clause 4.7	Annex A11
Lift	Unintended Carrier Movement Protection (UCMP)	Clause 4.8	Annex A12
Lift	Governor operated safety gear instantaneous type	Clause 4.6 and Clause 4.6.2	Annex A8
Lift	Governor operated safety gear progressive type	Clause 4.6 and Clause 4.6.3 and Annex B4	Annex A9

Lift Car & Lift Shaft Lighting – Life Expectancy Minimum 6000 Hours

Where tungsten filament or fluorescent lamps are fitted within the car interior, car interior (feature lighting), signal & operating fixtures, these are to be replaced with LED equivalent within 24 hours of notification.

The Contractor is to replace any maintenance lighting within the machine rooms and lift shaft. Any light fittings are to satisfy the Trust's technical requirements.

Key Account Manager

The Contractor shall appoint a Key Account Manager who shall be fully responsible for liaising with the Trust and Trust's Representative on all matters relating to the Contract.

The appointed Manager will ensure that all matters relating to the contract are administered correctly, including settlement of financial details.

The appointed Manager shall attend liaison meetings with the Trust and or Trust's representative monthly at dates to be agreed.

At such meetings, the appointed Manager will be expected to provide evidence to verify the following:

- That Service Levels are being met as detailed to contract
- That the service and breakdown documentation is being issued, stored, and retained correctly
- That the service visits are taking place on the correct dates indicated
- That the H&S standards as required by legislation are being always adhered to
- That the invoicing is correct and cost controls are in place

Prior to meeting attendance, the Account Manager shall provide all documentary information to the satisfaction of the Trust and Consultant such as but not limited to the following:

- Management information
- Costings out of line with the agreement
- Response times
- Breakdown quantities and route cause analysis
- Breakdowns resolution times
- Annual condition report for each lift
- Continuous improvement opportunities
- LOLER examination dates

A contract representative must be available as a point of contact at all times, including Bank Holidays and 'out of normal working hours'. Mobile phone numbers are to be advised and form the means of this necessary communication, as these businesses are 7 day a week, 24-hour a day concerns.

In order to administer and review the status and performance of this Contract, it is intended to hold periodical meetings. The initial meeting will implement the contract. Meetings will then be on a

quarterly basis to ensure satisfactory performance. The reports shall be forwarded electronically to the Trust or the Trust's appointed agent seven days prior to the agreed meeting dates.

Periodic Reviews

The Contractor is to include within their price, the cost of attending review meetings with the Service Manager. The meetings are to be held quarterly. The Contractor shall be represented at such meetings by senior sales and operational personnel briefed by the appropriate site representatives.

The Contractor shall provide at the review meetings the following information presented for the previous period:

- Records of breakdowns on a unit by unit basis. The records shall show; the Client's unit reference; the time and date of the breakdown and the allocated breakdown number.
- Safety related events.
- A month-on-month percentage figure of individual unit availability on a rolling 12-month basis.
- Review of predictive monitoring results on a unit by unit basis.
- Notice of forthcoming repairs.
- Progress of clearing contractual issues arising from statutory inspection and SVM reports.
- Mean time between failures per unit.
- Records, including dates, of maintenance visits on a unit by unit basis.
- Status of SLAs.

Assets

Assets are detailed in the in accompanying pricing schedule.

Invoicing and Payment Terms

The Client will raise an upfront order for the full contract duration and require invoicing after works.

Invoices must be clearly marked with the current purchase order number together with the name, area and location of the equipment/area worked on.

Any repairs which are not included in the contract up to the value of £1,000.00 (plus VAT) can be undertaken after verbal agreement from Estates and a purchase order number will be provided. Repairs over the value of £1,000.00 (plus VAT) require a quotation with a full cost breakdown.

Terms and Conditions

Bidders should be aware any contracts arising from this procurement process shall be subject to the NHS Conditions for the Provision of Services with Maintenance Schedule. A copy can be obtained from:

[https://lifecycle.co.uk/wp-content/uploads/2023/11/NHS Terms and Conditions For The Provision of Services with Maintenance Schedule Aug 2022.pdf](https://lifecycle.co.uk/wp-content/uploads/2023/11/NHS_Terms_and_Conditions_For_The_Provision_of_Services_with_Maintenance_Schedule_Aug_2022.pdf)