

Technical Specification

For the Provision of Maintenance Services Issued by

University Hospitals of Morecambe Bay NHS Foundation Trust

Tender Reference Number: LGM37724

Maintenance Contract

Passenger & Goods Lifts

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Introduction

This document provides full details of the Client's requirements for the provision of maintenance of Passenger & Goods 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

University Hospitals of Morecambe Bay NHS Foundation Trust "Client" is seeking to contract for the provision of a service to ensure their equipment is kept in a safe and reliable working order and operating with 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.

The winning contractor(s) must provide the service in accordance with the original equipment manufacturers (OEM) recommendations and the requirements set out in this Technical Specification.

This includes the following:

- Service / Maintenance visits, frequency and detailed requirements set out below
- Reactive call outs in accordance with requirements set out below
- Telephone support
- Spare parts and consumables

The Client reserves the right to add or remove equipment if required during the contract term.

Lots

This procurement is being run in four lots. You only need to complete the sections relevant to the lot(s) you are bidding for. See the Information Document for further details.

Lot 1 – Lifts for Royal Lancaster Infirmary, Ashton Community Care Centre, and Queen Victoria Hospital (RLI, ACCC, & QVH)

Lot 2 – Lifts for Furness General Hospital (FGH)

Lot 3 – Lifts for Westmoreland General Hospital (WGH)

Lot 4 – Lifts for all sites

Please note if you are bidding for Lot 4 you **must** submit pricing for the individual Lots 1, 2 and 3.

Contract period

The contract will commence on 1st June 2025 and will remain in place for three years, subject to the satisfactory performance of the Contractor.

Location and sites

Name and address of sites where the contract will be carried out:

- RLI – Royal Lancaster Infirmary, Ashton Road, Lancaster, Lancashire LA1 4RP
- ACCC – Ashton Community Care Centre, Pointer Court, Ashton Road, Lancaster LA1 4JJ
- QVH – Queen Victoria Hospital, Thornton Road, Morecambe, Lancashire LA4 5NN
- FGH – Furness General Hospital, Dalton Lane, Barrow-In-Furness, Cumbria LA14 4LF
- WGH – Westmoreland General Hospital, Burton Road, Kendal, Cumbria LA9 7RG

Working hours

Normal working hours are 07:00 and 17:00 Monday to Friday.

Contract Requirements and Level of Cover

The Client requires a pre-planned maintenance contract, with ad-hoc work and parts to be charged in addition to the fixed price contract. The Contractor(s) will also be required to respond to call-outs, entrapments and breakdowns within the response times set out below.

Planned Preventatives Maintenance is to include 12 service visits per year to be carried out monthly by a fully trained and qualified service engineer – not a fault finder. The Trust will expect at least one of these visits to be completed by a Technician level service engineer to ensure higher levels of service and maintenance are provided.

Where there are differences between the Contractor’s maintenance levels and the Client’s specification, the Client’s requirements detailed in this Technical Specification are always to be met.

The following needs to be undertaken:

Scheduled service visits

Scheduled service visits to include the list below. This list is not exhaustive but is intended to be guidance on the minimum requirements to ensure the lifts remain in operationally good condition.

Current legislation and regulations in addition to original equipment manufacturers maintenance guidelines and recommendations shall prevail in all circumstances.

Monthly Checks

Area	Details if applicable
Passenger Lifts	
Goods Lifts	
Gear Box	Lubricants shall be maintained to the manufacturers recommended levels and only the lift manufacturers recommended lubricants or equivalent to be used.
Controllers	All equipment is to be thoroughly inspected, cleaned and adjusted to the manufacturer's specification.
Brake	The brake drum and coil casing are to be thoroughly cleaned, adjusted and checked for minimum lift. Brake linings are to be checked for security and replaced if they are found to be worn. Stopping level accuracy of the lift car is to be checked and adjusted to comply with all design parameters, this is to include after any adjustments have been carried out on the brake.
Hydraulic Unit	Oil level shall be checked. If it is found to be low then it is to be topped up using fresh oil. The oil used must be accordance with manufacturer's specification or equivalent alternative if suitable.
Hydraulic Unit	The valve block characteristics are to be checked against the original specification as necessary for acceleration, deceleration, top speed and re-levelling accuracy in accordance. All to be with the design parameters.
Car Enclosure	All operating devices and indicators within the lift car are to be checked for their correct operation. If necessary these are to be replaced or repaired.
Car Enclosure	A functional check of the alarm bell and car telephone (if applicable) or any communication system is to be carried out
Car Enclosure	Door operators are to be electronically and mechanically adjusted to give smooth and efficient operation along with all associated devices such as detectors, safety edges and light rays. The door operating casings shall be cleaned of all extraneous oil, lubricants and dust.

Car Enclosure	The door closing pressure and kinetic energy is to be checked in compliance with the current British Standards and adjusted as necessary.
Car Enclosure	All signal and operating lamps, car and emergency lighting (if applicable) are to be functionally checked and replacement lamps and tubes fitted as required.
Car Enclosure	All electrical switches are to be cleaned and checked for operation.
Car Enclosure	The main safety circuit are to be functionally checked to ensure that it is fully operational.
Car and Landing Entrances	All door suspension rollers and associated equipment shall be inspected for wear and tear. These are to be replaced if necessary.
Car and Landing Entrances	All lock pick-up rollers and associated equipment shall be checked for integrity. These are to be replaced when necessary.
Car and Landing Entrances	Check operation of all landing pushes and indicators. These are to be replaced / repaired as necessary.
Car and Landing Entrances	Clearances between door panels, architraves, returns etc are to be checked and adjusted as necessary to ensure compliance with current British Standards.
Lift Shaft, Counterweight and Pit	Lift shaft lighting and car top lighting (where necessary) are to be checked and lamps replaced as necessary to ensure that the lighting is in good working condition.
Lift Shaft, Counterweight and Pit	Check sheave bearing lubrication where applicable.

Bi-Monthly Checks (every two months, and in addition to monthly checks)

Area	Details if applicable
Gear Box	This is to be regularly cleaned. Inspection cover removed and crown wheel checked for marking. Any running noise, wear to the thrust race and other bearings is to be reported to the Trust and replaced when necessary. The gearbox oil shall be checked for

	viscosity and condition. When degradation is evident it shall be replaced.
Hydraulic Unit	The pump, valve block, motor and associated equipment are to be regularly cleaned. All filters are to be cleaned and/or changed in accordance with the manufactures instructions.
Hydraulic Unit	The oil is to be checked for viscosity, contamination and oxidation when the original characteristics are degraded. The oil is to be replaced at least every 5 years.
Car and Landing Entrances	All bottom tracks are to be cleaned.

Quarterly Checks (in addition to monthly and bi-monthly checks)

Area	Details if applicable
Motors	Motor bearings are to be checked for wear. Lubrication levels are to be checked and where appropriate will be adjusted.
Motors	All AC motors are to be checked for any evidence of overheating or rotor bars coming loose. If either of these is found, corrective action is to be taken immediately.
Car Enclosure	Car guide shoes are to be checked for wear. Any surface oil or grease is to be removed from the outer casing and they should be adjusted to give the best attainable ride within the lift car, commensurate with the minimum running clearance to the blade of the guide rail.
Lift Shaft, Counterweight and Pit	All suspension rope termination points are to be inspected for integrity and split pins fitted in all eye bolts where required and the lock nuts checked for tightness.
Lift Shaft, Counterweight and Pit	Suspension ropes, governor ropes and compensating ropes (where fitted) are to be inspected and the number of splinters reported in accordance with Health and Safety Note PM7.

Lift Shaft, Counterweight and Pit	Counterweight safety gear, overspeed governor, tension weight and associated devices, pick up points etc, are to be checked for integrity.
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Bi-Annual Checks (twice a year, and in addition to the checks above)

Area	Details if applicable
Machine Room	Any DC motor is to have their brush equipment cleaned and carbon deposits removed from the commutators and field windings.
Car and Landing Entrances	Locks are to be inspected for mechanical and electrical operation. All electrical terminal shall be checked for tightness and internal parts cleaned.

Annual Checks (in addition to all the checks above)

Area	Details if applicable
Car Enclosure	The safety gear, overspeed governor, tension weight and all associated devices and pit-up points are to be checked thoroughly for integrity.
Car and Landing Entrances	All top tracks are to be lightly lubricated.
Lift Shaft, Counterweight and Pit	Limit switches are to be internally inspected, contacts checked and cleaned. Appropriate lubrication is to be applied if applicable.
Lift Shaft, Counterweight and Pit	Counterweight is to be checked for integrity and the shoes and suspension pulleys, where fitted, are to be checked for wear and the appropriate adjustments carried out.
Lift Shaft, Counterweight and Pit	Compensating weight pulley bearings (where fitted) are to be lubricated to the manufacturers requirements and a functional

	check carried out to ensure that the compensating weight is moving freely within its guide rails.
Lift Shaft, Counterweight and Pit	Compensating weight electrical interlock switch is to be checked for its lock-off operation and the internal parts clean.
Lift Shaft, Counterweight and Pit	Compensation chains (where fitted) are to be checked for security and integrity. Any guide rollers shall be checked for free operation and wear with replacement as necessary.

Phone support

A 24-hour phone support service is required 365(6) days per year.

Reactive call-outs

A 24-hour emergency response call-out service is required, 365(6) days per year and is to be charged in addition to the contract cost and as per the rates submitted in the Pricing Schedule.

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.

Rectification of faults shall be carried out only with the authority of the Estates Officer or their designated representative at an agreed price, following submission of a quotation.

Response times

An engineer is to be on-site within the required response times below:

Fault Reported	Response Time
Entrapment incident	Within 1 hour
Fault reported in working hours	Within 4 hours
Fault reported outside of working hours	Within 4 hours
Fault reported not affecting operation of lift	Within 24 hours

The Client has a trained passenger release team to deal with all entrapments within working hours. The above entrapment response time would be required for outside of working hours.

Spare Parts

The Contractor is responsible for providing all spare parts relevant to the maintenance of the equipment. The engineer who carries out the service/maintenance visit must carry all spare parts and consumables required to carry out the works for these visits. In the event of obsolete parts, an appropriate equivalent will be accepted.

The cost of spare parts is to be charged in addition to the fixed contract price.

Key Performance Indicators

If a regular call-out engineer is unable to rectify the fault within the above-mentioned response times, the Contractor will ensure the attendance of an Area Technician within the next 24 hours. Failure to adhere to these timeframes will result in the Contractor paying the Client a daily rate of £100 until the fault is fixed unless otherwise agreed with the Estates officer or their designated person.

Refurbishment

The Client expects the Contractor to be able to bid for refurbishment works in addition to the maintenance contract if required in the future.

Please note the Client reserves the right to obtain alternative quotations for refurbishment works and is under no obligation to use the winning Contractor for this service. In the event this takes place this does not absolve the winning Contractor from performing their duties under this contract.

Immobilisation

If upon discovering any defect or any part in need of replacement, which in the opinion of the Contractor is or is likely to become dangerous and for which he is unable to effect immediate repair, the Contractor will, without delay, take such steps as are necessary to render the plant safe or, failing that immobilise the plant and immediately notify the Client of his action. In the event of immobilisation, the Contractor shall immediately advise the Client's representative.

Statutory Regulations

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

1. Electricity at Work Regulations 1989
2. Health and Safety at Work etc. Act 1974
3. The Building Regulations 2010
4. Requirements for Electrical Installations, IET Wiring Regulations (18th Edition) (BS 7671)
5. Control of Substances Hazardous to Health 2002
6. Management of Health & Safety at Work Regulations 1999
7. Provision and Use of Work Equipment Regulations 1998 (PUWER)
8. Lifting Operations and Lifting Equipment Regulations 1998 (LOLER)
9. Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 (RIDDOR)
10. Guidelines on the Supplementary Tests of In-Service Lifts (SAFed)
11. LEIA Safety Information Sheet Safety at Lift Landings
12. BS 5655 - Lifts and service lifts
13. BS 7255:2012 - Code of Practice for Safe Working on Lifts and/or its latest 2023 edition
14. HTM 08-02: Lifts 2016
15. BS EN 13015:2001+A1:2008 - Maintenance for lifts and escalators
16. BS 5266-1:2016 - Code of practice for the emergency lighting of premises.

Accreditations

An engineer working on the equipment covered under this contract must be minimum NVQ3 qualified or have an equivalent lift maintenance qualification. The winning Contractor will be required to provide evidence.

Contractor Responsibilities

The winning Contractor must have the access, capability and technical knowledge to effectively maintain the Client's equipment. This includes all necessary service / diagnostic tools, and any access codes / specialist equipment / software.

All work must be carried out with minimal disruption to Client staff and hospital occupants.

While on site the Contractor and its staff must comply with the requirements of the Health and Safety at Work Act 1974 and other relevant legislation, including regulations and codes of practice issued and with the Clients own policies and procedures.

All new Contractors attending site for the first time must go through a Maintenance Site Induction.

All Contractors must report to the Estates Office and sign in before commencing work during normal working hours. For out of hours call outs, the Contractor should report to the location of the unit where they will be met by an Estates representative.

A "Permit to Work System" is in operation at the sites and the Contractor must comply with such procedures.

It is imperative all Contractors sign out before leaving site.

Visits to the locations are not permitted without the consent of the authorised officer.

All Contractors' employees who attend site shall be DBS checked by the Contractor.

The Contractor shall provide its staff with a form of identification acceptable to the Client. This must always be displayed whilst on site.

Following the Client's site induction, the Contractor's staff will be provided with identification which must be worn while on site.

The Contractor shall cause as little interference as possible with other activities in or near the locations.

The Contractor shall have awareness training for Asbestos and will report any concerns to the Trust's Estates Department.

In the event the Contractor enters the hospital buildings then compliance with all current NHS/Hospital guidelines is mandatory.

Contractor's Tools and Equipment

The Contractor shall provide all necessary transport and equipment, including but not limited to; tools, instruments, test kits, PPE, access equipment, temporary barriers and signage, and first aid equipment necessary to carry out the work safely and as detailed in the Control of Contractors documents.

Reporting

A detailed report outlining all equipment must be completed after every service. Details must include all work carried out including any parts replaced and any recommendations. Any safety or quality issues should be immediately highlighted.

Hard copy service sheets (where available) should be left with the Client with an electronic copy emailed to the named Estates Officers within one week. Details of who needs to be sent an electronic copy will be provided at the site induction.

Service sheets should be signed by the Operations Manager or Operations Officer. If there are any issues, please contact the Estates Department.

Quarterly

1. Summary of callouts for past quarter.
2. Confirmation of maintenance visits completed during past quarter.
3. Confirmation of completed LOLER defects during past quarter/status.
4. Contractor to provide a detailed inventory of such parts at the commencement of this Contract, as well as monitoring and reporting on stock levels quarterly.
5. Safety test status – Annual and five-yearly to be included, ten-yearly at additional cost undertaken following risk assessment by competent person.
6. Listing of Sick units under escalation.
7. List of lifts out of service during the past quarter.
8. List of repeated call-outs per lift to identify recurring faults.
9. Formal meetings held to review Strategic performance of the contract. Reports required for these meetings to be issued five working days in advance of the meeting date.
10. Quarterly maintenance statistics are to be recorded and reported.
11. Invoicing.

Condition survey reports

The Contractor must carry out a comprehensive condition survey within the first three months of contract on all the lift equipment and provide a safety checklist. The survey should detail the following:

1. Any repairs required.
2. Any advice and/or recommendations to comply with the latest British standards.
3. Any advice and/or recommendations as published by the Health and Safety Executive.
4. Any recommendations to improve the efficiency of operation of the lift equipment.
5. Any safety issues found on all Mechanical, Electrical / Electronics / Communication and or Building.

Although the provision of LOLER reports as prescribed under the Lifting Operations and Lifting Equipment Regulations 1998 is not included in the Contract, this does not relieve the Contractor from any of their responsibilities with respect to reporting elements that, in his opinion, are detrimental to the safe operation of the lift equipment subject to this Contract.

The cost of the survey and works carried out following agreement of the findings from the condition report will be chargeable to the Trust, based on the rates quoted in your bid.

LOLER reports

The winning Contractor shall be responsible to rectify defects listed on the LOLER reports within the period specified as below:

1. Insurance reports to be acknowledged as received within two working days of receipt.
2. Non chargeable defects to be completed within 30 days of receipt and 48 hours if lift is to be out of service.
3. Quotation for chargeable items to be sent within 30 calendar days of receipt and 48 hours if lift is to be out of service.
4. All items to be closed and confirmed accordingly within 60 calendar days of receipt.

Where an immediate or timed defect notice/LOLER report is received, the Contractor should address the issue as a matter of priority and not wait until the end of the defect notice period.

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

SAFED – supplementary tests for in-service lifts

The winning Contractor may, at the request of the Client's Insurance Inspector, be asked to undertake supplementary examination and testing of lifts as defined in the Safety Assessment Federation (SAFed) guidelines.

The Contractor is responsible for providing, storing and removing any specialist equipment, such as load weights, before and after each test.

On completion of each SAFed test, a certificate indicating the performance of the test in accordance with the guidelines, showing the date and the signature of the competent person shall be forwarded to the Client AP.

The cost for these is to be excluded from the contract cost. Please provide pricing for these tests as per the checklist on the accompanying Pricing Schedule.

Reviews

The Client requires an implementation meeting with the winning Contractor to be carried out at the start of the contract. This will include a site visit and induction.

Thereafter, the Client reserves the right to request regular and/or ad-hoc review meetings to discuss and appraise performance. The schedule and agenda of the meetings to be agreed at the initial

implementation meeting and the Contractor is responsible for contacting the Client to make the arrangements.

Review meetings will typically cover but are not limited to:

- Planned visit completion review and service performance
- Response and resolution times for un-planned work
- Review and agreement of the value of any additional works
- H&S and Access, quality assurance, and contract variations
- Finance & Invoicing
- Asset Register, Reports and Recommendations

Invoicing and Payment Terms

The Client will raise an upfront order for the full contract duration and require invoicing monthly in arrears.

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 require a quotation with a full cost breakdown, no work should be undertaken before a separate purchase order is received.

Any authorised repairs undertaken should be clearly marked as such on invoices with a full cost breakdown.

Assets

Please see accompanying Pricing Schedule for detailed asset register.

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:

[NHS Terms and Conditions for the provision of services with maintenance schedule 5 - Aug 2022](#)