

## Appendix A – Project Plan

Milestone			Forecast start	Forecast End	Duration (days)
Line	Project stage	Task			
1	<b>Key Bid dates</b>	Receive DESNZ notification of successful Bid	26/02/2024	15/03/2024	18
2		Grant Offer Letter is signed	28/02/2024	18/03/2024	19
3	<b>(MS1) - Project Team Established</b>	Develop resource management plan including key roles for each party (Savills and UDC)	03/01/2024	19/01/2024	16
4		Formalise Project Management Team and associated specifications including Retrofit Assessment, Retrofit Coordination and Client Advisor Service.	22/01/2024	01/02/2024	10
5		Execute Project Team Call Off Agreement (F21 Framework). Note: Pre award activities to called off immediately, but further call off will be subject to award of funding.	01/02/2024	02/02/2024	1
6	<b>Pre-award activities</b>	Develop contractor Term Brief, Specifications and Cost Model and associated pre-contract negotiations with Equans Ltd	05/02/2024	29/02/2024	24
7		Undertake sample Retrofit Assessments on each Archetype and update Improvement Option Appraisals	05/02/2024	29/02/2024	24

8	<b>(MS2) Procurement Complete</b>	Negotiation and agreement of project terms with Equans	03/06/2024	26/08/2024	84
9		Execute agreement between UDC and Equans	02/09/2024	16/09/2024	14
10		Equans Delivery team established (including Professional Services Design Team to PAS 2035)	16/09/2024	07/10/2024	21
11		Contract Launch meeting and agree partnering timetable, information exchange (e.g. address list, asset data, vulnerable tenant list, asbestos register etc.) and mobilisation plan	16/09/2024	30/09/2024	14
12		Equans to produce and agree with UDC the Construction Phase Health, Safety and Quality Plan	16/09/2024	30/09/2024	14
13		Equans discharges all Pre-Design Phase requirements from mobilisation plan	07/10/2024	21/10/2024	14
14		Equans to confirm proposed measure installers and stage 2 supply chain tender requirements	07/10/2024	21/10/2024	14
15		Equans discharges all general pre-start requirements from mobilisation plan	16/09/2024	21/10/2024	35
16	<b>(MS3) Pre-Construction tenant engagement</b>	Send out initial letter to residents. Informing appointment of contractor and the process of assessment, IOE and design	23/09/2024	30/09/2024	7

17		Create further information leaflet, tenant newsletter, social Media engagement and carry out community in person events	24/09/2024	01/10/2024	7
18		Equans to carry out Resident Correspondence 2 - Arrange property design and technical survey and provide liaison contact details	07/10/2024	28/03/2025	173
19		UDC/Equans to carry out post design /pre-installation consultation	21/10/2024	11/04/2025	173
20		Identify community champions in each area for the project	23/10/2024	30/10/2024	7
21		Create webpage for information for residents to be referred to	23/10/2024	30/10/2024	7
22		Brief customer service on information to give to residents who call	16/09/2024	23/09/2024	7
23		RLO to conduct visits to those identified as having vulnerable characteristics or needing additional support	23/09/2024	25/11/2024	63
24	<b>(MS4) PAS Risk Assessments Complete</b>	Savills to undertake PAS2035:2019 Risk Assessments and upload to PASHub	01/04/2024	31/10/2024	213
25	<b>(MS5) Dwelling assessment complete</b>	Savills to carry out Retrofit Assessment and IOE and upload to PASHub	01/04/2024	31/10/2024	213

26	<b>(MS6) Design and Co-Ordination</b>	PAS2035 - Retrofit Designs and Building Control Submissions - Equans to create and submit property pack from survey outputs	07/10/2024	28/03/2025	173
27		Pre-Installation Retrofit Co-Ordination Design Compliance Checks (Inclusive of Necessary Amendments)	07/10/2024	25/04/2025	201
28		Equans and UDC to appraise Planning requirements (4x EWI units plus any ASHP installs triggering requirement owing to placement) and submit applications as required	07/10/2024	25/04/2025	201
29		Retrofit co-ordinator and building control sign-off	07/10/2024	25/04/2025	201
30		(DNO process) Equans to carry out installation design in accordance with MCS. Produce layout drawing and schedules of work for validation and approval	07/10/2024	25/04/2025	201
31		Equans to gain DNO Approval on designs	07/10/2024	25/04/2025	201
32		Equans to Establish Site and conduct H&S check of Site set-up	23/10/2024	27/02/2026	493
33		Equans to discharge all property related prestart requirements	07/10/2024	27/02/2026	509
34	<b>(MS7) and (MS8) Instillation phase</b>	Phase 1 (CB10 1) - 13 Units	04/11/2024	25/11/2024	21
35		Phase 2 (CB10 2)- 74 Units	04/11/2024	28/02/2025	117

36		Phase 3 (CB11 4)- 75 Units	02/12/2024	31/03/2025	119
37		Phase 4 (CB11 3 )- 22 Units	03/02/2025	30/09/2025	240
38		Phase 5 (CM6 1)- 62 Units	01/09/2025	27/02/2026	179
39		Phase 6 (CM6 2)- 14 Units	03/11/2025	27/02/2026	116
40		Phase 7 (CM6 2)- 14 Units	03/11/2025	27/02/2026	116
41		Scheme/Site Manager to visit prior and during installation to oversee Resident care	21/10/2024	27/02/2026	495
42		Technician in receipt of Survey and Site-Specific Risk Assessment prior to attending site	21/10/2024	27/02/2026	495
43		Introduce to customer, explaining purpose of visit and presenting I.D. card. Go through installation and placements of components.	21/10/2024	27/02/2026	495
44		Resident induction highlighting all hazards and risks to residents affected by the works	21/10/2024	27/02/2026	495
45		Assess the suitability of the structure, pre-scaffold checks if required prior to unpacking the equipment.	21/10/2024	27/02/2026	495
46		Carry out safety Risk assessment and toolbox talk.	21/10/2024	27/02/2026	495

47		Installation carried out in accordance with Equans specific Method and site-specific Risk Assessments	21/10/2024	27/02/2026	495
48		Test all equipment for successful operation. Any final pre-handover snagging works will be carried out to client satisfaction, remove all tools and equipment	21/10/2024	27/02/2026	495
49		Clear away all waste products and property left clean and tidy. All wastage disposed to comply with environ legislation	21/10/2024	27/02/2026	495
50	<b>(MS9) Handover and evaluation</b>	Handover Phase 1 (CB10 1) - 13 Units (Equans)	04/11/2024	30/12/2024	56
51		Handover Phase 2 (CB10 2)- 74 Units (Equans)	04/11/2024	07/04/2025	154
52		Handover Phase 3 (CB11 4)- 75 Units (Equans)	10/02/2025	28/10/2025	260
53		Handover Phase 4 (CB11 3 )- 22 Units (Equans)	02/06/2025	28/10/2025	148
54		Handover Phase 5 (CM6 1)- 62 Units (TBC)	29/09/2025	27/03/2026	179
55		Handover Phase 6 (CM6 2)- 14 Units (TBC)	01/12/2025	27/03/2026	116
56		Handover Phase 7 (CM6 2)- 14 Units (TBC)	01/12/2025	27/03/2026	116
57		Property offered by CONTRACTOR to UDC for handover and checks on completed works	18/11/2024	27/03/2026	495

58		CONTRACTOR to instruct the Resident in the efficient use of the system, leave user instructions and provide emergency contact number with the Resident.	04/11/2024	27/03/2026	509
59		UDC and CONTRACTOR'S Supervisor to carry out quality inspections of work audits and complete quality assurance checklist to ensure required standards are achieved	04/11/2024	27/03/2026	509
60		CONTRACTOR'S Engineers to carry out snagging if required	04/11/2024	27/03/2026	509
61		CONTRACTOR to provide completion handover pack to UDC including NIC certificate, Customer satisfaction form (when complete) & MCS if required	04/11/2024	27/03/2026	509
62		CONTRACTOR to follow up installation with Customer Satisfaction visit	18/11/2024	27/03/2026	495
63		Complete customer satisfaction form with Resident and submit to head office for processing	18/11/2024	27/03/2026	495
64		Register installation on building control, Trustmark and MCS if required	18/11/2024	27/03/2026	495
65		Funding Compliance and Warranties	18/11/2024	27/03/2026	495
66		Book 6 month follow up visits for residents	18/11/2024	27/03/2026	495