

SCHEDULE 33

This is Schedule 33 comprising the Requirements for a fully functioning Customer Service Centre referred to in the Project Agreement for the PRIME Project

BETWEEN

The Secretary of State for Work and Pensions

- and -

The First Secretary of State

- and -

Trillium (PRIME) Limited

- and -

Trillium (PRIME) Property GP Limited

**dated 27 March 1998
as Expanded and Restated on 15 December 2003**

PART I

REQUIREMENTS FOR A FULLY FUNCTIONING CUSTOMER SERVICE CENTRE

Requirements

1. From the Commencement Date the Customer Service Centre shall:
 - (a) provide a single point of contact for the needs of DWP, any OGD or ISB or DWP Contractor at a Facility to be met in a friendly, efficient and knowledgeable manner;
 - (b) cover a range of services such as maintenance requests, health and safety issues, catering requests;
 - (c) ensure requests are carried out to completion through a sophisticated tracking and monitoring system;
 - (d) route service requests to the appropriate personnel of the PRIME Contractor or Service Providers according to escalation procedures;
 - (e) provide source data for the Performance Measuring System; and
 - (f) facilitate invoice checking for billable items against completed work to confirm correct billing and to enable efficient processing of payment for work.

2. The requirements set out in paragraph 1 will be achieved by:
 - (a) using the Customer Service Centre computer system in the PRIME Contractor's service centres manned with professional facilities management personnel who have been extensively trained with the Customer Service Centre application;
 - (b) training Customer Service Centre personnel during the period from 28 March 1998 until the Commencement Date to use the Customer Service Centre application;
 - (c) ensuring Customer Service Centre personnel are familiar with the Facilities, the individual requirements of the different DWP agencies and their employees as well as other relevant matters;
 - (d) training personnel in customer service;
 - (e) automating many of the links between the Customer Service Centre and Service Providers; and
 - (f) providing back up personnel and systems.

3. From the Commencement Date, Customer Service Centre personnel will provide the following functions to DWP:
 - (a) 24 hour customer service with Customer Service Centre personnel staffing the centre during Normal Working Hours and any calls outside these hours being routed through 24 hour security desks coupled with call out procedures;
 - (b) the logging and tracking of every call on the Customer Service Centre database;
 - (c) prompt handling of each call through the use of an automatic call distributor;
 - (d) selection and despatching of one or more Service Providers based upon Site location and the logging of contract information and required response times using the work order as authorisation;
 - (e) the prioritising of emergencies and informing appropriate personnel;
 - (f) the monitoring of the status of each request and logging this on the database in accordance with the priorities;
 - (g) verification that each work order has been completed and logging this on the database;
 - (h) allowing any employees of DWP, OGDs, ISBs or DWP Contractors within DWP estate to call the Customer Service Centre with a facilities related problem. The Customer Service Centre employee will then open a service request and take details of the location of the caller, the location to which the request relates and information about the problem being reported. The urgency of the request will also be determined and a priority assigned. The priorities will be linked to the required response times set out in the Service Requirements;
 - (i) once the Service Provider has been contacted, generating a work order. This will constitute an authorisation to proceed with the work. The Customer Service Centre employee will then notify the appropriate contact within the Facility to arrange access for the Service Provider who will then carry out all authorised work; and
 - (j) dealing with calls in accordance with the response times set out in the Service Requirements.

4. In order to be fully functioning, the Customer Service Centre database and associated files must include or be capable of including the following types of data at the Commencement Date:
 - (a) Sites with associated regions, area, address and description;
 - (b) service requests with details of caller and problem;

- (c) work orders with Service Providers dispatched;
 - (d) Service Providers with addresses, phone numbers, contact names and minimum charge/visit;
 - (e) work types with associated Service Providers for specific Sites/areas;
 - (f) charge back category (billable/non-billable) and associated accounting codes;
 - (g) authorisation limits of the PRIME Contractor's staff;
 - (h) audit files identifying who has updated a record, what was changed, and when the change occurred;
 - (i) budgets for "unscheduled" work by Site, with actual expenses and not to exceed limits per invoice;
 - (j) contact names and telephone numbers for all facilities related personnel;
 - (k) event logs of all action taken related to a service request;
 - (l) hazardous materials list; and
 - (m) caller with phone numbers (if number of callers is small).
5. The Customer Service Centre will allow a number of standard reports to be generated by Customer Service Centre and DWP staff including service request reports, work order data and reports and Site reports. In addition, the Customer Service Centre will provide authorised representatives of DWP with the ability to access the data fields set out in paragraph 4 above on an ad hoc, read only basis for the purpose of preparing DWP's own reports.

PART II

Verification for a Fully Functioning Customer Service Centre

All verification in this Part shall be carried out in respect of Facilities in the areas now designated by DWP as "Estates Unit 1" or "Estates Unit 2".

1. The requirements set out in paragraphs 1 (a) - (f) of Part I of this Schedule shall be verified, prior to the Commencement Date, as follows:
 - (a) the Customer Service Centre will have a universal telephone number that is published and made available to DWP, any DWP Contractor, OGD or ISB at a Facility;
 - (b) the Customer Service Centre shall demonstrate to DWP that it has a computer system that has an appropriate number of work types to enable the Customer Service Centre to categorise all calls;
 - (c) by way of information communicated through simulated telephone calls made by DWP to the Customer Service Centre, demonstrate by using service request and work order screens that it has a computer system in place that can track calls and monitor their progression from the initial request, to informing Service Providers, to satisfying the request;
 - (d) the Customer Service Centre shall provide to DWP, in sufficient detail, the procedures that the Customer Service Centre will follow upon receiving a call. Such procedures shall make provision for all eventualities and back-up provisions;
 - (e) the Customer Service Centre shall demonstrate that it has a computer system in place that can store and analyse such data entered into it and such data can also be down loaded to produce the PMS reports;
 - (f) the Customer Service Centre shall demonstrate to DWP that it has a computer system in place that can verify works carried out, invoices received and payments made.

2. The verification procedures for the requirements set out in paragraph 2 of Part I of this Schedule shall be as set out in this paragraph.
 - (a) The requirements set out in paragraphs 2 (a) - (d) of Part I of this Schedule shall be verified by the Customer Service Centre prior to the Commencement Date as follows:
 - (i) the provision of a Customer Service Centre training manual comprising the training that Customer Service Centre personnel receive in both customer

service and computer systems, which shall be sufficient for them to perform their functions;

- (ii) demonstrating that the Customer Service Centre computer system is being manned by professional FM personnel trained in accordance with the Customer Service Centre training manual; and
- (iii) demonstrating that all Customer Service Centre employees have attended PRIME Induction talks and presentations relating to the service that DWP requires, and have visited at least one DWP office.

(b) The requirements set out in paragraph 2 (e) of Part I of this Schedule shall be verified by the Customer Service Centre demonstrating to the satisfaction of DWP that it has fax links or e-mail links to its Service Providers.

(c) The requirements set out in paragraphs 2 (f) of Part I of this Schedule shall be verified by the Customer Service Centre by providing DWP prior to the Commencement Date with a Disaster Recovery Plan. Such Disaster Recovery Plan shall comprise of back-up procedures in the event of the loss of personnel, computer systems and in other circumstances where the Customer Service Centre may not be fully operational.

3. The requirements set out in paragraph 3 of Part I of this Schedule shall be verified in accordance with this paragraph 3.

(a) The requirements set out in paragraphs 3 (b), (d), (f), (g) and (h) of Part I of this Schedule shall be verified by way of information communicated through simulated telephone calls made by DWP to the Customer Service Centre, prior to the Commencement Date, which demonstrates to the satisfaction of DWP that Customer Service Centre personnel will:

- (i) be available at all times from 7.00 a.m. to 7.00 p.m.;
- (ii) log all calls in sufficient detail and prioritise them in accordance with the Response Times set out in the Service Requirements;
- (iii) track calls and monitor their progression from the initial request, to informing Service Providers, to satisfying the request;
- (iv) communicate such requests in sufficient detail, including priority, to relevant Service Providers;
- (v) select and despatch one or more Service Providers, as is appropriate, depending on the request and the Site location;

- (vi) verify that each work order has been completed and log the time taken to complete the task;
 - (vii) have access to the appropriate contact within a Facility who can arrange access for a Service Provider to carry out the authorised work.
- (b) The requirements set out in paragraph 3 (a) of Part I of this Schedule shall be verified prior to the Commencement Date by the Customer Service Centre providing to DWP in sufficient detail their procedure for dealing with calls made outside Normal Working Hours.
- (c) The requirements set out in paragraph 3 (c) of Part I of this Schedule shall be verified prior to the Commencement Date by the Customer Service Centre demonstrating to SIEMENS that the Meridian ACD system is capable of distributing calls in accordance with that paragraph.
- (d) The requirements set out in paragraph 3 (e) of Part I of this Schedule shall be verified prior to the Commencement Date by the Customer Service Centre demonstrating to DWP that it has in place procedures and contacts in the case of emergencies.
4. The requirements set out in paragraph 4 of Part I of this Schedule shall be verified by way of information communicated through simulated telephone calls made by DWP to the Customer Service Centre prior to the Commencement Date, which demonstrate to the satisfaction of DWP that Customer Service Centre database includes or is capable of including all the information contained in that paragraph. In addition the Customer Service Centre shall demonstrate to the satisfaction of DWP that:
- (a) work orders can be despatched by fax or e-mail;
 - (b) the computer system is capable of categorising requests as billable, non-billable or under other accounting codes;
 - (c) the computer system is capable of retaining an event log containing the history of a request or a Site, or such other information as may be necessary to retain a comprehensive history of calls made to the Customer Service Centre. Such event log shall be updated as appropriate;
 - (d) DWP are provided with a list of the authorisation limits of the PRIME Contractor's staff.
5. For the purposes of verifying the requirements in paragraph 5 of Part I of this Schedule the Customer Service Centre shall provide DWP with various reports as stated in that paragraph. In addition the Customer Service Centre shall set up a remote terminal prior

to the Commencement Date to demonstrate the ability of authorised representatives of DWP to dial-in and access the data fields set out in paragraph 4 of Part I of this Schedule.