



Holdings Pty Ltd

REQUEST FOR TENDER

CONTRACTOR WORK PACKAGES

SHEPI – AIR CONDITIONING & ENERGY EFFICIENCY WORKS

DOCUMENT 10

PROGRAM, TENANT MANAGEMENT, REPORTING & PERFORMANCE REQUIREMENTS

Issued by ATIZ Group Procurement

This document forms part of ATIZ's contractor procurement package for the SHEPI Air Conditioning and Energy Efficiency Works.

Tender Reference: ATIZ-SHEPI-010

Document Control

Item	Details
Document	Document 10 – Program, Tenant Management, Reporting & Performance Requirements
Issued By	ATIZ Holdings Pty Ltd – Procurement
Project	SHEPI – Air Conditioning & Energy Efficiency Works
Project Client	Aboriginal Housing Office (AHO)
Tender Reference	ATIZ-SHEPI-010

1. Purpose

This document defines ATIZ's requirements for mobilisation, program control, tenant/access management, daily delivery, reporting and contractor performance.

2. Program Basis

ATIZ will issue work progressively by property/work order. Contractors must maintain resources and sequencing consistent with their accepted tender commitments and ATIZ's master program.

Area	Indicative Program Context
Zone 2	359 properties – Murray River, Edward River, Wagga Wagga, Hay, Bland, Griffith, Lachlan, Leeton and Narrandera.
Zone 3	708 properties - Newcastle, North coast, Brisbane Waters, and the Central Coast
Zone 4	278 properties – Clarence Valley, Kyogle, Lismore and Richmond Valley.
Zone 5	128 properties - Cootamundra, Queanbeyan
ATIZ delivery approach	ATIZ may sequence zones, packages and work orders to suit the master program, tenant access, approvals and contractor performance.

3. Mobilisation

- Complete onboarding, licences, insurances, inductions, system training and approved project documentation before field mobilisation.
- Nominate supervisors, crews, administration contacts and escalation pathways.
- Demonstrate materials/plant/logistics readiness before accepting production allocations.
- Participate in start-up meetings and ATIZ planning workshops.

4. Contractor Program

- Provide an initial detailed program for the awarded package when requested.
- Show mobilisation, scoping, approvals, procurement, installation, evidence close-out, access exceptions and completion.
- Use logical predecessors/successors and identify critical or near-critical activities.
- Update the program when actual progress or ATIZ instructions materially change the forecast.
- Provide recovery actions where progress falls behind accepted commitments.

5. Tenant Contact and Appointments

- ATIZ/AHO will introduce the program to tenants as arranged; contractor contact must be professional and limited to authorised project purposes.
- Maintain at least 48 hours notice for planned scoping/install appointments unless another lawful arrangement is approved.
- Book a specific day and agreed time window (for example AM/PM) through the ATIZ process.
- Do not enter on Sundays/public holidays or outside lawful access hours unless the tenant agrees and ATIZ permits.
- Minimise the duration of entry and disruption to the household.

6. No Access and Rescheduling

Event	Required Action
Tenant not home / inaccessible first visit	Record attendance, notify ATIZ as required and make the permitted rescheduling attempt.
Second failed attendance	Refer the property to ATIZ for resolution unless ATIZ instructs another attempt.
Excess furniture / obstructed work area	Do not move heavy belongings; record and refer to ATIZ.
Uncontrolled animal	Do not proceed if unsafe; record and notify ATIZ.
Hazardous / illegal item	Stop affected work and notify ATIZ.

7. Property Scoping and Work Order Approval

- Complete the required property scope before installation where allocated.
- Upload/submit all draft scope information required by ATIZ.
- Do not install unapproved line items.
- Work orders are property-specific and may contain detailed line-by-line items.
- Escalate scope ambiguity before commencing work.

8. Daily Delivery and Same-Property Coordination

- Coordinate AC, electrical, ceiling fan, LED, door seal and make-good work to minimise repeat disruption where multiple measures are allocated.
- Aim to leave the property complete on the planned installation day where reasonably practicable.
- Do not leave exposed penetrations, unsafe electrical states, incomplete make-good or uncommissioned equipment.
- Where an access exception prevents full completion, secure the property/work area and immediately advise ATIZ of the outstanding items.

9. Daily and Weekly Reporting

Report	Minimum Content
Daily progress	Properties attended/completed, works installed, no-access/hold properties, incidents, defects, outstanding evidence and next-day plan.
Weekly look-ahead	Planned properties/locations, crew allocation, forecast output, access risks, material constraints and decisions required.
Weekly performance	Completed vs plan, cumulative output, defects/rework, evidence backlog, no-access list, Aboriginal participation data where requested.

10. Monthly Program Report

Where requested, contractors must provide information enabling ATIZ to prepare its monthly program report, including:

- changes to significant activities and reasons;
- shortfalls and recovery measures;
- changes in sequencing/logic;
- critical-path or key-interface risks;
- forecast completion against agreed dates;
- delay/extension claims notified under the contractor agreement.

11. Performance KPIs

KPI Area	ATIZ Assessment
Safety	Incidents, SWMS compliance, inspections, regulator notices, corrective-action closure.
Program	Attendance reliability, daily output, completion vs allocation, recovery responsiveness.
Quality	Defect rate, first-pass quality, rectification time, repeat defects.
Evidence	First-pass acceptance, completeness, submission timeliness, CCEW/commissioning accuracy.
Tenant service	Complaints, communication, conduct, property protection and sign-off.
Commercial	Pricing compliance, unauthorised variations, invoice accuracy.
Aboriginal participation	Agreed labour/spend contribution and reporting quality.
Environmental	Waste/refrigerant compliance, incidents and records.

12. Work Allocation and Performance

ATIZ may increase, reduce, suspend or reallocate future work based on program need, geographic demand, access, safety, quality, evidence, capacity and commercial performance, subject to the contractor agreement.

13. Variations and Unapproved Work

- Do not carry out additional work outside the approved ATIZ work order/scope without written authorisation, except immediate make-safe action.
- If an issue is already covered by an ATIZ schedule item, use the applicable process rather than treating it as an unrelated variation.
- Submit variation information with description, cause, evidence, price and program impact before the work proceeds where practicable.

14. Invoicing Readiness

- Only properties/work items that meet ATIZ completion and evidence requirements are claimable.
- Provide property reference/work-order details, completed quantities, approved variations, evidence status and any supporting documents requested by ATIZ.
- ATIZ may batch completed property claims monthly.
- Duplicate claiming of a property/item is prohibited unless specifically authorised.

15. Meetings and Escalation

- Attend coordination/performance meetings requested by ATIZ.
- Escalate safety, access, technical, approval, material and program risks early.
- Nominate an authorised manager able to commit contractor resources and corrective actions.
- Maintain current contact details for after-hours emergencies where relevant.

16. Tenant Handover

- Demonstrate efficient operation and basic maintenance of installed equipment.
- Explain wall controller use and restricted temperature range.
- Complete tenant works sign-off/customer-satisfaction records required by ATIZ.
- Leave contact/warranty information where instructed.

17. Tenderer Program Submission

- Indicative mobilisation date.
- Proposed daily/weekly output by package/zone.
- Crew and supervisor deployment plan.
- Access-exception strategy.
- Program methodology and recovery strategy.
- Reporting/admin resources.