Company Pack

Example Heating Services Ltd

Plumbing & heating, based in Newcastle. Issue 1, April 2026

EXAMPLE ONLY. This is a made-up company to show what a finished pack looks like.

How to use this example. Buyers ask for the same documents in almost every bid. This is a complete pack for a typical small plumbing & heating business, so you can see what to gather and roughly how much to write. Your own pack must be about your real business: never copy insurance, accreditations, clients or results you don't have. The certificates are marked SPECIMEN: get your real ones from your insurer and the schemes you belong to.

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1. Company profile

Example Heating Services installs, services and repairs heating and hot water systems in council homes, schools and public buildings across the North East.

We are on the Gas Safe Register and every gas engineer carries their Gas Safe ID card. We are also OFTEC registered for oil and MCS certified to install heat pumps.

We run a 24-hour call-out service and aim to restore heating to vulnerable tenants within four hours.

Registered name	Example Heating Services Ltd
Company number	12345678 (example)
VAT number	GB 123 4567 89 (example)
Find a Tender identifier	EXAMPLE-ID-0001
Registered office	1 Example Road, Newcastle (made-up address)
Years trading	13
Staff	15, all directly employed
Yearly turnover	£1m to £5m
Areas covered	Newcastle, Gateshead, North and South Tyneside, Sunderland and Northumberland
Phone	01632 960000 (a number reserved for examples)
Email for bids	bids@example.com

Services

- Gas safety checks and boiler servicing
- Boiler and heating repairs
- Heating installations and upgrades
- Heat pump installation
- Water hygiene (legionella) checks

2. Who does what

Buyers want to know who is responsible for what, and who they will deal with.

Name	Role	Responsible for
A. Example	Managing Director	Overall responsibility, health and safety, safeguarding lead, signs bids
B. Sample	Contracts Manager	Runs day-to-day work, staff rotas, first point of contact for clients
C. Specimen	Senior Gas Engineer	Site checks, training new staff, quality inspections
D. Demo	Office Manager	Invoices, records, data protection, insurance renewals

How the contract is managed

B. Sample is the client's single point of contact and answers calls and emails within one working day. C. Specimen visits every site regularly to check standards and staff. A. Example meets every client at least twice a year to review how the contract is going and agree any changes.

Out of hours, an on-call manager can be reached on the main number 24 hours a day for emergencies.

3. Insurance

A summary of cover, then a specimen of each certificate. Buyers usually ask for copies of the real certificates.

Type of cover	Insurer	Limit	Policy number	Runs out
Public liability	Example Insurance Co	£5,000,000	EXAMPLE-PL-0001	31 March 2027
Employers' liability	Example Insurance Co	£10,000,000	EXAMPLE-EL-0001	31 March 2027
Professional indemnity	Example Insurance Co	£1,000,000	EXAMPLE-PI-0001	31 March 2027

Employers' liability: the law says you must have at least £5 million of cover if you employ anyone, and you must display the certificate where staff can see it (a digital copy is fine).

Specimen: public liability certificate

This is what a certificate looks like. Your insurer or broker gives you the real one.

Certificate of public liability insurance

Example Insurance Co (a made-up insurer), 1 Example Street, London

SPECIMEN
NOT A REAL DOCUMENT

Insured	**Example Heating Services Ltd**
Address	**1 Example Road, Newcastle**
Policy number	**EXAMPLE-PL-0001**
Period of insurance	**1 April 2026 to 31 March 2027**
Business description	**Plumbing & heating contractors**
Limit of indemnity	**£5,000,000 any one occurrence**
Territorial limits	**Great Britain, Northern Ireland, the Isle of Man and the Channel Islands**
Indemnity to principals	**Included**

Signed for Example Insurance Co (specimen, unsigned)

Date of issue: 1 April 2026

This specimen was made for an example Company Pack. It is not a certificate of insurance and does not provide any cover. The insurer named on it does not exist.

What buyers check on this certificate

- The company name matches yours exactly, including Ltd
- The limit is at least what the tender asks for, often £5 million or £10 million
- It is in date for the start of the contract, not just today
- The business description covers the work in the contract
- "Indemnity to principals" is included: it means the policy also protects the buyer

Specimen: employers' liability certificate

This is what a certificate looks like. Your insurer or broker gives you the real one.

Certificate of employers' liability insurance

Example Insurance Co (a made-up insurer), 1 Example Street, London

SPECIMEN
NOT A REAL DOCUMENT

Insured	**Example Heating Services Ltd**
Address	**1 Example Road, Newcastle**
Policy number	**EXAMPLE-EL-0001**
Period of insurance	**1 April 2026 to 31 March 2027**
Business description	**Plumbing & heating contractors**
Limit of indemnity	**£10,000,000 any one occurrence**
Territorial limits	**Great Britain, Northern Ireland, the Isle of Man and the Channel Islands**
Employer's reference number	**123/EX00000 (example)**

Signed for Example Insurance Co (specimen, unsigned)

Date of issue: 1 April 2026

This specimen was made for an example Company Pack. It is not a certificate of insurance and does not provide any cover. The insurer named on it does not exist.

What buyers check on this certificate

- The limit is at least £5 million, the legal minimum (most policies give £10 million)
- It is in date
- Your employer's reference number is shown

Specimen: professional indemnity certificate

This is what a certificate looks like. Your insurer or broker gives you the real one.

Certificate of professional indemnity insurance

Example Insurance Co (a made-up insurer), 1 Example Street, London

SPECIMEN
NOT A REAL DOCUMENT

Insured	**Example Heating Services Ltd**
Address	**1 Example Road, Newcastle**
Policy number	**EXAMPLE-PI-0001**
Period of insurance	**1 April 2026 to 31 March 2027**
Business description	**Plumbing & heating contractors**
Limit of indemnity	**£1,000,000 any one occurrence**
Territorial limits	**Great Britain, Northern Ireland, the Isle of Man and the Channel Islands**
Indemnity to principals	**Included**

Signed for Example Insurance Co (specimen, unsigned)

Date of issue: 1 April 2026

This specimen was made for an example Company Pack. It is not a certificate of insurance and does not provide any cover. The insurer named on it does not exist.

What buyers check on this certificate

- The limit matches the tender, often £1 million or more
- It covers the kind of advice or design in the contract
- It is in date

4. Accreditations and training

Accreditation	Reference	Runs out	What buyers check
Gas Safe Register	EXAMPLE-GS-0001	31 March 2027	That it is in date and covers the work in this contract
OFTEC	EXAMPLE-OFT-0001	31 March 2027	That it is in date and covers the work in this contract
MCS (heat pumps)	EXAMPLE-MCS-0001	31 March 2027	That it is in date and covers the work in this contract
WaterSafe approved plumber	EXAMPLE-WS-0001	31 March 2027	That it is in date and covers the work in this contract
CHAS Standard	EXAMPLE-CHAS-0005	31 March 2027	That it is in date and covers the work in this contract

Copies of each certificate are kept in the real pack. Several schemes publish a free online register, so buyers often check membership themselves.

Training matrix

The training every member of staff has, by role.

Role	Training	How often
Gas engineer	Gas Safe registration with the right categories (ACS), Legionella awareness	ACS renewed every 5 years
Plumber	NVQ Level 3, WaterSafe, unvented hot water (G3)	G3 every 5 years
Heat pump installer	MCS, low temperature heating design	Every 5 years

Training records are kept for every member of staff, with certificates and refresher dates, and checked each month.

5. Health and safety policy

Written in the three parts the Health and Safety Executive recommends: our promise, who is responsible, and how we do it.

Part 1: Statement of intent

Example Heating Services Ltd will, as far as reasonably practicable, protect the health, safety and welfare of our employees and of anyone affected by our work, including our clients, their staff, pupils, residents and the public. We will meet the Health and Safety at Work etc. Act 1974 and the regulations made under it as a minimum, and aim to do better.

We will assess the risks of our work and put sensible controls in place, consult our staff, give them the training, information and equipment they need, keep equipment safe, and review this policy every year.

Part 2: Responsibilities

Who	Responsible for
A. Example, Managing Director	Overall responsibility for health and safety, making sure there are enough resources, and reviewing this policy
B. Sample, Contracts Manager	Making sure risk assessments are done before work starts, staff are trained, and accidents are reported and investigated
C. Specimen, Senior Gas Engineer	Checking safe working on site, stopping unsafe work, briefing staff on site risks
Every employee	Following training and safe methods, using the equipment provided, reporting hazards, accidents and near misses

Part 3: Arrangements

Risk assessment

A written risk assessment is done for every site and activity before work starts, shared with staff, and reviewed every year or when anything changes. A sample is in section 9.

Consultation

We talk to staff about health and safety at team meetings and site visits. Anyone can raise a concern with any manager at any time.

Safe equipment

Equipment is checked before use, serviced to the maker's schedule and taken out of use if faulty. Portable electrical equipment is tested. See the register in section 10.

Gas safety

Only engineers on the Gas Safe Register, qualified for the appliance in question, do gas work, as the Gas Safety (Installation and Use) Regulations 1998 require. Unsafe appliances are made safe and labelled straight away.

Information, instruction and supervision

Every new starter has an induction covering this policy, site rules and emergency procedures. Supervisors check safe working on every visit.

Training and competence

Staff are trained for each task and only do work they are trained and competent for. See the training matrix in section 4.

Accidents, first aid and ill health

Every vehicle and site has a first aid kit and a trained first aider is on call. All accidents and near misses are recorded and investigated. Reportable incidents are reported to the HSE under RIDDOR.

Working at height

We avoid working at height where we can. Where we can't, we use the right access equipment, used by trained staff, as the Work at Height Regulations 2005 require.

Manual handling

We use trolleys and lifting aids, train staff in safe lifting, and plan two-person lifts for heavy items.

Lone working

Lone workers check in at the start and end of each shift, carry a charged phone, and do not do high-risk tasks alone.

Driving for work

Drivers hold a valid licence, check their vehicle daily, never use a hand-held phone, and plan breaks on long journeys.

Emergencies

Staff follow each client's fire and emergency procedures, which are explained at induction to each site.

Monitoring

Managers carry out site safety checks, review accident records every month, and report to the Managing Director.

Signed	A. Example, Managing Director, for Example Heating Services Ltd
Date	1 April 2026
Next review	1 April 2027, or sooner if the law or our work changes

6. Other policies

Each one is a short, complete policy. Buyers mainly check you have it, it fits your size, and it is signed and in date.

Environmental policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. We plan rounds to cut miles driven, use concentrated or refillable products where we can, separate our waste for recycling, and switch equipment off when not in use. This year we are replacing our oldest van with an electric one.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Equality, diversity and inclusion policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. We treat staff, job applicants and customers fairly whatever their age, sex, race, religion, disability, sexuality, pregnancy or marital status, as the Equality Act 2010 requires. We do not tolerate harassment. Anyone can raise a concern with the director in confidence.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Modern slavery policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. We check every worker's right to work before they start, pay everyone directly into their own bank account, and never hold anyone's passport or ID. We only use suppliers we know and will report any concern to the Modern Slavery Helpline.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Safeguarding policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. The director is our safeguarding lead. Every member of staff who works in schools, care settings or people's homes has an enhanced DBS check and safeguarding awareness training. Staff report any concern to the lead the same day, who follows the client's own procedure.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Quality management policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. Supervisors check every site against a written checklist at least once a month and record the result. Problems are put right within 24 hours. We ask every client for feedback every quarter and act on it.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Data protection (UK GDPR) policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. We are registered with the Information Commissioner's Office. We keep only the personal information we need, store it securely, and never share it without a lawful reason. Keys, alarm codes and access cards are logged and kept locked away.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Business continuity policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. If staff are off sick we have trained cover staff on call. If a van breaks down we use a hire van the same day. Records are backed up online every night. In bad weather we contact the client before the start time and agree a plan.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

Anti-bribery and corruption policy

Who it covers. All employees, and anyone working for us or on our behalf, on every contract.

Our commitment. We never offer or accept bribes or favours to win or keep work, as the Bribery Act 2010 requires. Any gift over £25 must be declared to the director. Anyone can report a concern without getting into trouble.

Responsibility. A. Example, Managing Director, is responsible for this policy and for making sure staff understand it. Concerns can be raised with any manager in confidence.

Review. Signed by A. Example on 1 April 2026. Reviewed every year, next on 1 April 2027.

7. Business continuity plan

What we do if something goes wrong, so the work carries on.

What could happen	Effect	What we do	Who
Staff off sick or on holiday	Sites not covered	Trained cover staff on call, rota planned 4 weeks ahead	Contracts Manager
Vehicle breakdown	Late or missed visit	Hire vehicle the same day, client told straight away	Contracts Manager
Severe weather or snow	Staff cannot travel	Client called before start time, priority sites agreed in advance	Contracts Manager
Supplier cannot deliver	Running out of materials	Two approved suppliers for every key item, 2 weeks' stock kept	Office Manager
Computer or phone failure	Lost records or contact	Records backed up online every night, calls diverted to mobiles	Office Manager
Fire or flood at our premises	Loss of equipment or office	Work from home or a temporary base, equipment hired the same day	Managing Director
Pandemic or major outbreak	Many staff off at once	Essential sites first, extra hygiene measures, client agreed plan	Managing Director

The plan is tested once a year with a desk exercise and updated afterwards.

8. Social value plan

What extra good we will do while delivering the contract, and how we will prove it.

We fit carbon monoxide alarms free on every visit where one is missing, employ two apprentices a year, and run winter energy advice sessions for tenants.

Theme	What we will do	How we measure it	How often we report
Local jobs	Recruit new staff for this contract from the local area first	Number and percentage of local hires	Every quarter
Skills	Train staff to recognised qualifications and offer an apprenticeship	Qualifications gained, apprentices taken on	Every year
Fair work	Pay at least the Real Living Wage and give fixed contracts	Hourly rates, staff turnover	Every year
Environment	Cut fuel use and waste on this contract	Miles driven, waste recycled	Every quarter
Community	Give volunteer time or free services to local good causes	Hours given, groups helped	Every year

Only promise what you can really deliver and measure. Buyers check social value commitments during the contract.

9. Risk assessment (sample)

One example. In the real pack there is one for each type of work, and one for each site before work starts.

Activity	Boiler service in an occupied home
Assessed by	B. Sample, Contracts Manager
Date	1 April 2026
Review	1 April 2027, or sooner if anything changes

Hazard	Who could be harmed	How we control it	Risk after controls
Gas escape	Engineers, tenants, neighbours	Tightness test, gas detector, emergency procedure, make safe and label	Medium
Carbon monoxide	Engineers, tenants	Flue gas analysis, flue checks, CO alarm check on every visit	Medium
Burns from hot pipes and water	Engineers	Allow to cool, gloves	Low
Vulnerable tenants	Tenants	ID shown, appointment confirmed, safeguarding training	Low
Asbestos in old flues and cupboards	Engineers	Check asbestos register, stop and report if suspected	Low

Staff read and sign the risk assessment before starting work on the site.

10. Test equipment register

A sample of the register we keep. The real one lists every item.

Instrument	Check	Calibration	Notes
Flue gas analysers (10)	Fresh air check before use	Yearly	Certificates kept
Gas leak detectors (10)	Before use	Yearly	One per engineer
Pressure gauges (10)	Before use	Yearly	Digital
Legionella thermometers (3)	Before use	Yearly	Water hygiene work

11. Quality checks

The checklist our supervisors use on site visits. Results are recorded and shared with the client.

Site	(site name)
Date and time	(date)
Checked by	(name)
Score	(number of items passed out of total)

Check	Pass	Fail	Comment or action
Gas tightness test passed			
Flue gas analysis recorded			
All appliances checked			
CO and smoke alarms tested			
Gas safety record given to tenant			
Work area left clean			

Anything that fails is put right within 24 hours, or sooner if it affects safety, and the client is told.

12. Past work

Real jobs like the ones being bid for, with results. Clients are only named with their permission.

Gas servicing and repairs for council homes

Client	A borough council in the North East
Worth	£310,000 a year
How long	5 years
Reference	Their facilities manager will give a reference. Details are shared with the buyer on request.

What we did. Yearly gas safety checks and servicing on 4,000 homes, plus 24-hour responsive repairs.

How it turned out. 100% gas safety compliance every year, with no homes going past their certificate date.

Heating upgrade at a secondary school

Client	Example Academy
Worth	£145,000
How long	1 summer holiday
Reference	Their facilities manager will give a reference. Details are shared with the buyer on request.

What we did. Replaced two failing boilers with high-efficiency units and new controls during the summer holidays.

How it turned out. Gas use fell by 22% in the first winter.

Heat pump installations in council bungalows

Client	Example Borough Council
Worth	£310,000
How long	1 programme
Reference	Their facilities manager will give a reference. Details are shared with the buyer on request.

What we did. Replaced old storage heaters with air source heat pumps and radiators in 32 bungalows, with tenants staying in their homes.

How it turned out. Average heating bills fell and every tenant was shown how to use the new controls.

13. How we do the work

Method statements for our main services.

Yearly gas safety checks in council homes

1. We send each tenant a letter with an appointment 8 weeks before their certificate runs out, followed by a text reminder.
2. If we cannot get in, we try three times at different times of day and keep a record of each attempt for the landlord.
3. The engineer shows their Gas Safe ID, checks every gas appliance, flue and pipework, and services the boiler to the maker's instructions.
4. Any unsafe appliance is made safe and labelled, the tenant is told why, and a repair is booked.
5. The gas safety record is given to the tenant and uploaded for the landlord the same day.
6. Engineers check a smoke and carbon monoxide alarm is fitted and working on every visit.

Responsive heating repairs

1. Calls are logged 24 hours a day. Vulnerable tenants with no heating or hot water are attended within 4 hours.
2. The engineer carries common parts and fixes most faults on the first visit.
3. If a part is needed, temporary heaters are left and the repair is booked.
4. Every job is recorded with photos, parts used and the gas safety checks done.
5. The landlord gets a weekly report of open and closed jobs.

14. Declaration

I confirm that the information in this Company Pack is true, complete and up to date, that I am authorised to sign bids on behalf of Example Heating Services Ltd, and that I will tell the buyer straight away if anything in it changes.

Name	A. Example
Position	Managing Director
Signed	(signature)
Date	(date)