



# SHAP SECRETARIAT PROCUREMENT OF ADMINISTRATOR AND PROJECT CO-ORDINATION AND TECHNICAL OFFICER SERVICES

May 2019      [www.shap.uk.com](http://www.shap.uk.com)



SHAP is a network of innovators and leaders from across the housing sector. We are passionate about smart investment in the UK housing stock, treating it as part of the essential infrastructure of sustainable places. As a network of practitioners, we are passionate about the need to shape the UK housing stock to become high quality, sustainable and supporting sustainable communities living in great places.

# SHAP SECRETARIAT – ADMINISTRATOR and PROJECT CO-ORDINATORS and TECHNICAL OFFICER PROCUREMENT May 2019

## Contents

BACKGROUND to this procurement.....	2
ABOUT SHAP .....	4
SHAP SECRETARIAT .....	4
ROLES AND RESPONSIBILITIES, COMPETENCIES TO BE DEMONSTRATED AND HOW TO APPLY .....	4
What is THE ADMINISTRATOR/PROJECT coordinator/ technical OFFICER ROLE? .....	6
Administrator Role and Responsibilities.....	6
Project Coordinator and Technical Officer Roles and Responsibilities.....	7
Role Requirements.....	7
Competencies to be demonstrated .....	8
CONTEXT .....	8
Relationships.....	8
Job Challenges:.....	8
Working locations: .....	9
WHO ARE WE? .....	9
WHAT DO WE DO? .....	9
Priority issues for SHAP are: .....	9
SHAP OUTREACH.....	10

## BACKGROUND TO THIS PROCUREMENT

SHAP has an increasing workload including a number of new research workstreams. SHAP is therefore procuring additional support to deliver the existing and any potential future activity streams. This procurement must meet the requirements of a range of funders including the European Regional Development Fund, Interreg, the West Midlands Combined Authority and other public sector organisations and is being advertised on the SHAP website and on Contracts Finder. The procurement is being managed by Carl Taylor and any queries should be addressed to him at [Carl.Taylor@bchs.coop](mailto:Carl.Taylor@bchs.coop). The evaluation of submissions will be carried out by an independent panel and signed off by the SHAP Board.

The intention of the SHAP Board is to appoint a panel of suppliers from June 2019 for up to 5 years. As the need arises and funding is secured, contracts will be awarded to suppliers on the panel according to the match of the strength of their expertise, experience and skills against the project requirements.

Submissions are invited from:

- individuals
- from organisations wishing to provide the services required from named individuals within their organisation.

Submissions are invited for those interested in roles as:

- Project administrator
- Project co-ordinators
- Project technical support

These are self employed roles and services will be commissioned through a contract with SHAP. No contract of employment will be offered. Continued commission of services will be based on performance during a 4 week trial period, reviewed monthly and on the SHAP workload.

Submission of an Expression of Interest or invitation to join SHAP for a trial period does not guarantee any long term commissions will be awarded by SHAP to any individual.

This document provides an introduction to SHAP, sets out the main job roles and responsibilities and explains how to submit an Expression of Interest for either the Administrator and/or the Project Officer role. The role will be partially funded by European funding which SHAP is a recipient of to deliver projects around sustainable Housing. This includes work on the Interreg Project CHARM which looks at circularity in Housing.

Submissions can be made for one or more roles by a single individual or organisation nominating an individual against each role.

A panel of suppliers will be set up based on a price/quality selection. The top 3 suppliers for each role will be appointed provided that they score at least 60% on each of price and quality.

**Contracts will be awarded for the following as funding is already secured:**

Interreg – sub partner in the Interreg CHARM project - Circular Housing Asset Renovation & Management 2019 – 2023

**Contracts are likely to be awarded for the following once funding is secured for further activity in 2019:**

The West Midlands Combined Authority – secretariat for the Energy Capital fuel poverty initiative which is establishing governance procedures in 2019 with a view to testing the design for ECO 4 at scale between 2020 and 2022.

**Work currently already contracted by the SHAP Board**

- The SHAP co-ordinator role.
- SHAP is already delivering ERDF (European Regional Development Fund) –technical assistance on low carbon housing innovation to potential applicants to the Greater Birmingham and Solihull Local Enterprise Partnership – 2019 – 2022. This procurement has already been completed.

**Future funding**

We are also involved in further bids to different funders. The outcomes of these bids are unknown at this stage.

We also receive funding from our members who provide goods and services within the housing sector.

## ABOUT SHAP

### SHAP SECRETARIAT

SHAP does not have direct employees.

The SHAP Secretariat is provided by independently procured individuals (or named individuals within organisations interested in this opportunity). Individuals can be sole traders or seconded from limited companies/charities/CICs etc.

The SHAP Secretariat has the following structure:

- SHAP co-ordinator reporting to the SHAP Board
- SHAP administrator / project co-ordinator/ project technical support reporting to the SHAP co-ordinator (these roles are currently vacant)
- SHAP Associates providing additional technical expertise in response to the requirement of SHAP research projects, working with the SHAP co-ordinator

### ROLES AND RESPONSIBILITIES, COMPETENCIES TO BE DEMONSTRATED AND HOW TO APPLY

An Expression of interest should be sent to SHAP at [carl@rch.coop](mailto:carl@rch.coop) by midnight on 4 June 2019 supported by a targeted CV and 2 testimonials from clients and/or colleagues.

Shortlisting selections will be made against the following criteria:

1. Experience and expertise: minimum of 5 years relevant track record in providing administrative / project officer support in the roles set out below or equivalent experience including familiarity with ERDF project administration.
2. Demonstration of personal competencies in the areas set out below
3. Hourly rate
  - a. This should include all travel time, travel costs and other expenses.
  - b. This should also include all travel time and travel costs and other expenses for attendance at workshops and events at locations across the West Midlands, unless otherwise agreed.

The contract will be awarded on the basis the 'Most Economically Advantageous Tender' ("MEAT") which balances cost against other considerations.

The Assessment Criteria are:

- |   |     |
|---|-----|
| 1. Cost – Composite Day Rate for lead consultant and other team support | 40% |
|---|-----|

*Please provide a composite day rate for all services.*

*If more than one staff members is proposed to work on the project,*

*please also provide the calculation for the composite day rate*

*ie % of time anticipated for each staff member and their individual day rate*

*The Day Rate should be inclusive of VAT and expenses but exclude events costs. Travel time is not paid.*

- |   |     |
|---|-----|
| 2. Experience of working on housing innovation projects including those funded by public and European grant | 20% |
|---|-----|

3. Familiarity with the low carbon housing, sustainability and fuel poverty challenges for the UK, the West Midlands in the housing sector, both public and private 20%

4. Track record in meeting the roles and responsibilities described below 20%

## 4.4 **Scoring Methodology**

### 4.4.1 **Quality Scores**

Responses to each of the written tender questions will be scored out of a maximum of 10 marks, using a standard method of scoring as set out in the table below:

Assessment	Score	Judgement/Criteria for assessment of answer
Exceptional	10	Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.
Good	7-9	The standard of proposals fully meets expectations.
Satisfactory	4-6	The proposals are acceptable but with some minor reservations.
Poor	1-3	The proposals are deficient in certain areas where the details of relevant proposal require the reviewer to make assumptions.
Unacceptable	0	Proposals are unacceptable or non-existent or there is a failure to properly address any issues.

Each scored question will then have a weighting applied (the weightings are shown against each question in the tender questionnaire).

(a) Example for a question scoring 4 out of 10 with a weighting of [2%].

- $(4/10) \times [2] = 1.2\%$  of total score available

The written submissions will be reviewed and scored by members of the scoring team. The same assessors will score each set of written submissions to ensure total consistency.

The scores for each quality question will then be added up to give an overall quality % score out of 60, the highest score being the winner.

#### 4.4.2 **Price Scores**

Each tenderer will receive a score against the total price, which shall be calculated by reference to the lowest total price submitted. The lowest tendered total price will receive a score of 40. The remaining tenders will then be scored on a standard deviation approach, based upon the difference between their tender and the lowest tender.

a) *Example: if the lowest tenderer bids [a price of £20,000] and another tenderer bids £25,000 then the £20,000 bid will receive a score of 40 out of 40. The score for the £25,000 bid, being 25% higher than the lowest tender, will reduce by 25%, therefore receiving a score of 30 out of 40.*

### WHAT IS THE ADMINISTRATOR/PROJECT COORDINATOR/ TECHNICAL OFFICER ROLE?

#### Administrator Role and Responsibilities

The purpose of this role is to provide a high level of administrative support to SHAP. Duties include:

1. assisting with the co-ordination, preparation and distribution of documents including word processing, spreadsheets, databases, graphical and presentation material and ensuring compliance with ERDF requirements regarding logos and publicity.
2. keeping the SHAP contacts database up to date
3. keeping the SHAP website up to date and animated
4. being responsible for making sure the SHAP monthly newsletter is produced and sent out by Mailchimp – sourcing content from the SHAP co-ordinator and the SHAP Board and Members
5. managing the SHAP Member, Partner and Sponsors database including date of renewal of fees and confirmation and issuing of SHAP membership certificates
6. managing the SHAP financial cash flow, reporting to the SHAP co-ordinator
7. assisting the SHAP co-ordinator in preparing financial reports and claims to funders
8. managing the organisational arrangements for SHAP meetings and workshops including events to support awareness of ERDF:
  - a. Booking venues
  - b. Confirming speakers
  - c. Advertising events via Eventbrite or similar
  - d. Confirming attendees
  - e. Producing the agenda and issuing 10 days before meetings and workshops
  - f. Producing the attendance and signing in sheet and sharing with the venue 2 days before the meeting/event
  - g. Managing the welcome desk at events and ongoing logistical support during the day

9. Liaise with colleagues, funders, partner organisations and voluntary and community organisations with an interest in the work of SHAP.

These tasks will involve the ability to:

10. use a word processing package such as Microsoft Word
11. write letters
12. deal with telephone and email enquiries, using an email system (e.g. Outlook)
13. photocopy and print various documents, sometimes on behalf of other colleagues
14. organise and store paperwork, documents and computer-based information
15. create and maintain filing and other office systems
16. keep diaries and arrange appointments
17. schedule and attend meetings, create agendas and take notes
18. book meeting room and conference facilities
19. liaise with external contacts
20. order and maintain stationery and equipment
21. organise travel and accommodation for the SHAP co-ordinator
22. use a variety of software packages (including Excel, Access and Powerpoint) to manage data and produce documents and presentations
23. use content management systems (CMS) to maintain and update websites and internal databases
24. manage and maintain budgets and carry out invoicing
25. sort and distribute incoming post and organise and send outgoing post
26. comply with data protection processes
27. Other tasks within the scope of the role

### Project Coordinator and Technical Officer Roles and Responsibilities

All of the administrator roles **PLUS** providing assistance to SHAP activities including:

1. Desk based research including production of technical briefings on topics agreed with the SHAP co-ordinator
2. production of draft questionnaires, newsletters etc
3. manipulation of statistical data
4. preparation of funding bids and generation of core funding
5. Work with Sponsors and Members on issues of interest to them
6. marketing SHAP and SHAP research outcomes, including the preparation of publications and social media.
7. Preparation of draft research reports
8. Liaison with the SHAP Board when requested by the SHAP co-ordinator
9. Other tasks within the scope of the role

### Role Requirements

#### *Administrator*

#### **You must have:**

- A good general standard of education including GCSE English or Maths at grade C or equivalent level 2 qualification or qualified by experience to equivalent level.



- Excellent written and verbal communication skills.
- Significant experience of working in an administration function.
- The ability to provide comprehensive information and direction when dealing with enquiries, working collaboratively with internal colleagues and external organisations/agencies to ensure that individual customer needs are met.
- The ability to accurately identify and gather relevant information and organise it into a usable format for analysis.
- Excellent administration and organisational skills and the ability to input, interpret and analyse data adhering to deadlines and targets.
- Good IT skills which include the ability to confidently use all Microsoft Office applications.
- The capability to respond quickly to changes that will impact upon service delivery.

#### *Project Coordinator/ Technical Officer*

In addition to the above, a degree or equivalent qualification

- Experience of self directed research
- An understanding of/interest in the UK low carbon and housing agendas.

Ideally you will also have:

- Previous experience of working in an administrative / project officer role or equivalent role
- An understanding of the energy efficiency in housing and decarbonisation of energy agenda.
- Experience of external funding regimes, systems and procedures.

#### Competencies to be demonstrated

- strong organisational skills
- presentation skills and attention to detail
- the ability to plan your own work, work on your own initiative and meet deadlines
- the ability to manage pressure and conflicting demands and prioritise tasks and workload
- the ability to accept and understand instructions
- oral and written communication skills
- tact, discretion and respect for confidentiality
- a pleasant, confident telephone manner
- team working ability
- reliability and honesty
- project-management skills

### CONTEXT

#### Relationships

- No supervisory/management responsibility attached to this post.
- **Other Contacts:** The SHAP Board, SHAP Members, Partners, Sponsors, other stakeholders and partners

#### Job Challenges:

To underpin the work of SHAP through sound and auditable administrative standards and processes.

To work in a self sufficient way with varying levels of support and face to face office time.

To be self motivated, keen to develop competencies, experience and expertise

To be confident in using the phone and email to reach out to SHAP stakeholders and the SHAP network.

To help build the SHAP network nationally.

### Working locations:

The role involves attendance in meetings and events which are normally held in Birmingham City Centre/around the West Midlands

Office base at West Bromwich/Stafford.

Remote working may be possible by agreement and will be subject to satisfactory outcomes from this working pattern.

Hours of work are flexible to be mutually agreed dependent on funding.

## WHO ARE WE?

SHAP is a membership network which acts a centre of excellence for sustainable housing. We carry out a range of activities and our areas of work are guided by our membership. All our work is freely available ([www.shap.uk.com/resources](http://www.shap.uk.com/resources))

The SHAP vision is that *'all domestic dwellings will be energy efficient, resilient to extreme weather, affordable and comfortable to live in, and that this will provide a structure for sustainable communities, attractive places to live and support jobs and skills within a low carbon economy'*.  
[www.shap-uk.com](http://www.shap-uk.com).

SHAP membership is drawn from across the housing sector and includes local authorities and other public bodies, social housing providers and contractors, consultants, suppliers and manufacturers offering services to the housing sector.

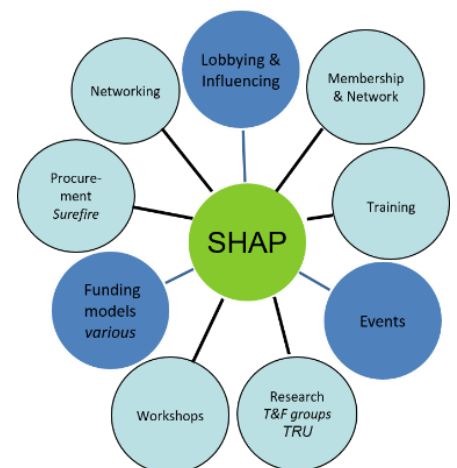
SHAP was originally set up by Sustainability West Midlands as a Regional Development Agency project but now provides services across England and is recruiting new Welsh and Scottish Members.

## WHAT DO WE DO?

We focus on improving policy and practice in order to address issues including poor housing, fuel poverty and vulnerable groups, climate change and resilience, transition to a low carbon economy.

### Priority issues for SHAP are:

- Creation of a sustainable housing stock that is comfortable and healthy to live in and affordable to run
- Support for sustainable communities through delivery of a sustainable housing stock which underpins the health and wellbeing of individuals
- Demonstrating that sustainable housing construction, retrofit and maintenance offers local economic development opportunities for individuals and businesses



- Tackling fuel poverty by ensuring housing is fit for purpose and promoting the use of data and digital connectivity to provide targeted support
- Tackling health and vulnerability issues by working towards data sets that can be interrogated to allow targeted support and investing in 'smart homes'
- Ensuring that rural issues are addressed equally with those of denser urban areas
- Understanding the risks and opportunities around new approaches to infrastructure investment, new technologies, resource management, data management, partnership working, new methods of construction, new financial/funding models and new approaches to procurement
- Addressing the role of governance in sustainable communities and supporting initiatives to improve financial, social and digital inclusion
- Supporting Local Authorities in discussions with housing developers to achieve the very best outcomes available in terms of housing fit for the future from the finance invested

#### SHAP OUTREACH

SHAP Members own over 250,000 homes and the wider network is responsible for over 500,000 homes. Local Authority Members also have regulatory powers and duty of care for many more home owners and tenants. In addition, selected Members provide domiciliary care to many tens of thousands of individuals.

Historically, SHAP has worked with almost all West Midlands Local Authorities and continues to maintain strong relationships with key changemakers. More recently we have extended our network and now have Members beyond the West Midlands and are seeking to build on key relationships across the UK.