



TENDER TO SHAP for the provision of services (in three lots) to support the delivery of SHAP programmes and projects including the INTERREG NWE CHARM project and any other further European or UK publicly funded projects between July 2019 to June 2024

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ENERGYCAPITAL

ABSTRACT

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 emerging in the next five years. 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. This procurement is being advertised on the SHAP website and on Contracts Finder.

The intention of the SHAP Board is to appoint panels to provide additional support to the SHAP Secretariat in 3 lots comprising Programme Manager, Programme Administrator and Technical Project Leads from July 2019 for up to 5 years. Contracts will be awarded as the need arises and funding is secured.

SHAP PROCUREMENT OF : PROGRAMME MANAGER, PROGRAMME ADMINISTRATOR & TECHNICAL PROJECT LEADS

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INVITATION TO TENDER

KEY DATES

Tender notice published on Contracts Finder	18 June 2019
Tender closing date	midnight on 3 July 2019
Evaluation period	from 8 July 2019
Interview date	tbc
LOTS 1, 2, 3: Confirmation of appointment	before 31 July 2019

PROCUREMENT SCOPE

SHAP is procuring three different Lots in this procurement. Tenderers may bid for one or more than one Lot but tenders should confirm which Lot they are bidding for and separate bids should be submitted for each Lot. Individuals or organisations may tender but the individual delivering the service must be nominated. Secondments will be considered. Initially all contracts would be for part time, flexible services. Hours of work are flexible to be mutually agreed dependent on funding and project delivery requirements.

LOT 1. Programme and Project Manager - initially 1-2 day(s) a week (subject to contracts currently in the pipeline being signed) but with the potential to increase

LOT 2. Programme Administrator - initially 1-2 day(s) a week (subject to contracts currently in the pipeline being signed) but with the potential to increase

LOT 3. Technical Project Lead - work packages to be confirmed subject to contracts currently in the pipeline and being signed (The panel of technical project leads will replace the panel of SHAP Associates who responded to an invitation from SHAP to provide support to SHAP activities in 2017.)

Submissions are invited from:

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

These are self employed roles and services will be commissioned through a contract with SHAP. No contract of employment will be offered. Contracts may be awarded for single tasks or on a rolling contract basis. Continued commission of services will be reviewed monthly with regard to the SHAP workload.

Submission of response to this Invitation to Tender does not guarantee any contract will be awarded. Any invitation to join a panel through this procurement does not guarantee any contracts will be awarded by SHAP.

All roles will be responsible to the SHAP Board and will work alongside and, where appropriate, report to the SHAP co-ordinator.

Projects already contracted with SHAP or about to be contracted include:

- CHARM, a circular economy project part funded by Interreg NWE
- Provision of technical assistance (TA) on low carbon housing innovation to Greater Birmingham and Solihull Local Enterprise Partnership regarding European Regional Development Fund project grant
- support to the West Midlands Combined Authority (WMCA) across several activity areas including Energy Capital, Environment Board and Housing and Regeneration.

VALUE OF CONTRACTS TO BE AWARDED THROUGH THIS PROCUREMENT

The value of all the contracts awarded through this procurement will not exceed £180,000 or 220,000 euro over 5 years including VAT (if applicable)

The value of individual contracts will range from £499.00 minimum to a total of less than £65,000 or 80,000 Euro per supplier over 5 years including VAT (if applicable). Contracts may be let as a single award for a specified task or on a monthly rolling basis, subject to the SHAP workload.

WORKING LOCATIONS

The role involves attendance in meetings and events which are normally held in Birmingham City Centre/around the West Midlands but some national and international travel may be required with advance agreement.

The office base will be at Accord Housing offices (www.accordgroup.org.uk) or at the SHAP office in Stafford (postcode ST16 3DP) or as otherwise agreed.

Remote working may be possible by agreement and will be subject to satisfactory outcomes from this working pattern. However attendance at team meetings will be required at least monthly.

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

EVALUATION OF TENDERS BY PRICE AND QUALITY

Tenders will be evaluated by a selection panel and the contract awarded to that offering the Most Economically Advantageous Tender (MEAT), in line with the contract award criteria. The evaluation of tenders submissions in response to this ITT will be based on 60% quality and 40% price. A minimum score of at least 70% is achieved on each of price and quality is required for any appointment to be made to any of the panels for Lots 1, 2 and 3.

Further information on the evaluation process and scoring methodology is given in Appendix 1.

INSURANCES

Insurances relevant to the role and contract will be required on contract award.

DURING THE BID PROCESS

Please direct any questions regarding the ITT content or process to Carl Taylor at carl@bchs.coop. You should not contact other SHAP personnel. SHAP reserves the right to disqualify and reject proposals from suppliers who do not comply with these guidelines.

Any queries raised during the tender process will be responded to via Contracts Finder and uploaded to the SHAP website. If you intend to submit a tender, please confirm this by email to carl@bchs.coop so that you can be advised of any tender queries or tender updates.

As part of this tender process SHAP makes no obligations in any way to:

- (i) pay any supplier for any ITT response; or
- (ii) award the contract with the lowest or any bidder; or
- (iii) accept any ITT information received from suppliers; or
- (iv) include suppliers responding to this ITT, in any future invitation; or
- (v) any other commitment to suppliers whatsoever.

HOW TO APPLY

Tenders on the attached Tender Response form should be submitted by email to carl@bchs.coop by midnight on 3 July 2019 supported by a targeted CV and 2 testimonials from clients and/or colleagues. The email subject heading should be **'SHAP ITT CLOSING DATE 3 July 2019.....'**

You should return the following documents:

Tender response form

Covering letter

Response to the ITT

Copy of insurances if available but not required at this stage

Copy of CVs

2 letters of endorsement

Certificate of non collusion

By submitting a response, you are committing to an agreement that you understand the requirement and have sufficiently addressed all aspects of the tender and information contained within the data and that you have checked all stated details, such as prices, to be correct and as intended.

INTRODUCTION TO THIS PROCUREMENT

SHAP activity is currently supported by a small secretariat comprising the SHAP Co-ordinator, who is in post, and the SHAP administrator, which is a vacant post.

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 emerging in the next five years.

The intention of the SHAP Board is to appoint additional support to the existing SHAP Secretariat (Programme Administrator and Programme & Project Manager) together with a panel of Technical Project Leads from July 2019 for up to 5 years.

Recognising that the procurement is for flexible service delivery, it is the intention of SHAP to appoint the 3 highest scoring bidders Lots 1 and 2 to a panel for that Lot and up to 6 of the highest scoring bidders to Lot 3 with at least 1 in each of the 3 topic areas. (See P10). The scoring is based

on a price quality approach of 40% price and 60% quality. A combined price/quality score of at least 70% is required for any bidder to be appointed to the panel for each Lot.

The initial contracts to be awarded in Lots 1 and 2 will be awarded to the highest scoring bidder. Additional work, as it comes forward, will be offered to the highest scoring bidder first and then to the second and then the third bidder in the panel for that Lot. Contracts will be awarded to suppliers in Lot 3 according to the match of the strength of their expertise, experience and skills against project requirements. Mini competitions may be run if several suppliers on the panel offer equal expertise, skills and experience.

The first contracts will be awarded for 2019 for projects with secured funding on completion of this procurement process.

This document provides an introduction to SHAP, sets out the main job roles and responsibilities and explains how to submit a Tender for each of the three roles. The contracts will be related to projects which may be partially funded by European funding. This includes work on the Interreg Project, CHARM, which looks at circularity in Housing.

SHAP receives over 50% of its income from public funds and is therefore required to follow public procurement rules. 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.

Contracts will be awarded to support delivery of the following project as funding is already secured:

1. Interreg NWE – sub partner in the Interreg CHARM project - Circular Housing Asset Renovation & Management 2019 – 2023
2. GBSLEP ERDF Technical Assistance to Applicants wishing to develop Priority 4 Low Carbon Housing Projects

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 but additional resource is required.
- SHAP is already delivering support to the West Midlands Combined Authority on the new build housing agenda and development of a healthy homes standard. Some additional resource may be required.

Future funding:

We are 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.

CONTRACT AWARDS - SUMMARY OF CURRENT POSITION

The first contracts will be awarded for 2019 for projects with secured funding on completion of this procurement process.

Projects already contracted with SHAP or about to be contracted include:

TABLE 1

Project name	SHAP role	Activities to be delivered
CHARM – a circular economy project funded by Interreg NWE (North West Europe)	Sub-partner Lead on UK dissemination on project activity and findings.	Definition and delivery of UK dissemination activity working with the UK and international CHARM partners and subpartners.
WMCA (West Midlands Combined Authority) Energy Capital Fuel Poverty programme – development of a governance structure for a proposed multi million pound programme to address fuel poverty	Provision of secretariat services to working groups reporting to the WMCA Energy Capital lead. (WMCA is also recruiting a full time lead and will be commissioning technical services)	Co-ordination of working groups, organisation of events and support to the working groups in collection of evidence base information
GBSLEP ERDF TA – technical assistance to Greater Birmingham Solihull Local Enterprise Partnership in delivery of European Regional Development Fund Priority 4 projects	Delivery of technical assistance to organisations interested in bidding for ERDF for low carbon housing projects.	The role involves awareness raising and capacity building through events and one to one support to potential bid applicants.

SHAP resource requirement for secured projects 2019 – 2022

SHAP has recently secured European funding for two workstreams. (See Table 1 above). The procurement resource requirement is therefore set out in calendar years to align with the EU financial year.

The secured grant against the 3 Lots in this procurement is shown below in Tables 2 – 4 for 2019 – 2022. No grant for has been secured for 2023, the final year of this procurement. SHAP has other project bids in development and it is the intention that this procurement will provide the resources to deliver additional projects contracted between 2019 and 2024.

SHAP additionally has core funding for the SHAP secretariat including the SHAP co-ordinator (in post) and the SHAP administrator to be procured through this procurement process.

TABLE 2 - SECURED GRANT 2019

	SHAP secretariat	Interreg – CHARM circular economy project	ERDF Technical Assistance	WMCA fuel poverty programme	No days/week required for 2019
Programme and Project Manager		X		X	1 - 2
Administrator	x	X	X	X	1 - 2
Technical Project Manager			X	X	1 - 2

TABLE 3 - SECURED GRANT 2020

	SHAP secretariat	Interreg – CHARM circular economy project	ERDF Technical Assistance	WMCA fuel poverty programme	No days/week required for 2020
Programme and Project Manager		X			0.5
Administrator	x	X	X		1 - 2

TABLE 4 - SECURED GRANT 2021 and 2022

	SHAP secretariat	Interreg – CHARM circular economy project	ERDF Technical Assistance	WMCA fuel poverty programme	No days/week required for 2020
Programme and Project Manager		X			0.5
Administrator	x	X			1

GLOSSARY

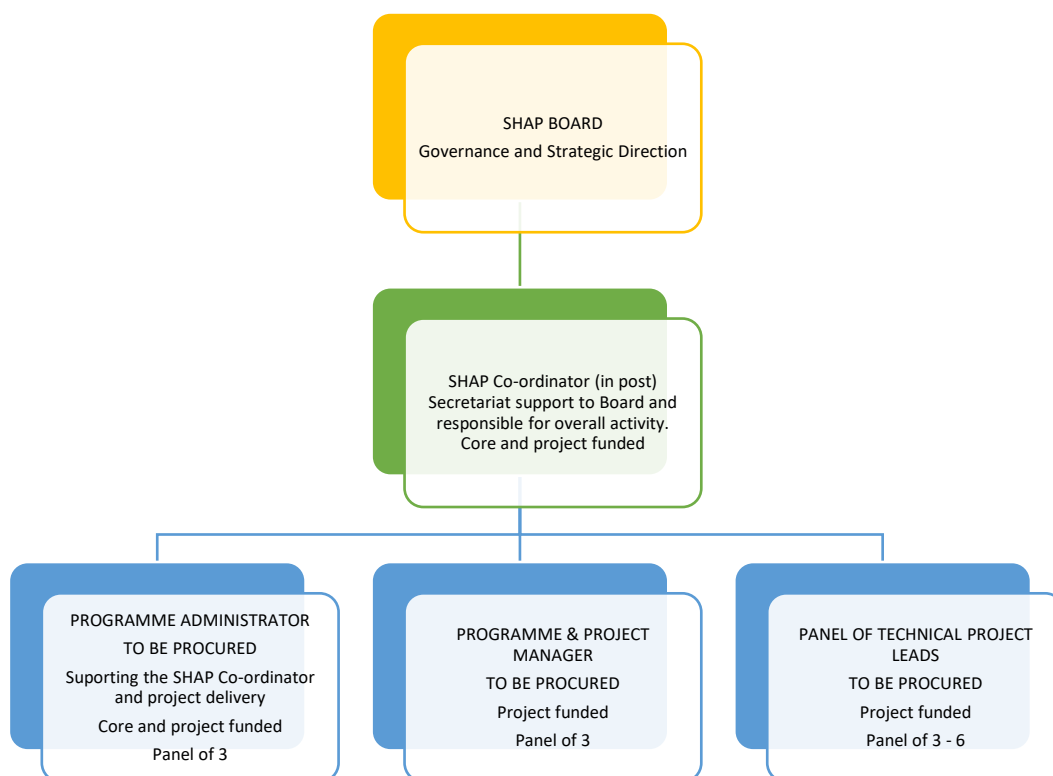
CHARM	Circular Housing Asset Renovation & Management – No More Downcycling	http://www.nweurope.eu/projects/project-search/charm-circular-housing-asset-renovation-management/
ERDF	European Regional Development Fund	https://www.gov.uk/guidance/england-2014-to-2020-european-structural-and-investment-funds
GBSLEP	Greater Birmingham and Solihull Local Enterprise Partnership	https://gbslep.co.uk/

INTERREG	Interreg Europe programme	https://www.interregeurope.eu/
SHAP	Sustainable Housing Action Partnership	www.shap.uk.com
TA	Technical Assistance	https://www.gov.uk/guidance/england-2014-to-2020-european-structural-and-investment-funds
WMCA	West Midlands Combined Authority	www.wmca.org.uk/

SHAP STRUCTURE

SHAP does not have direct employees.

The SHAP Secretariat and technical services are provided by independently procured individuals (or named individuals within organisations). Individuals can be sole traders or seconded from limited companies/charities/CICs etc. The proposed structure following this procurement will be:



The panel of technical project leads will replace the panel of SHAP Associates who responded to an invitation from SHAP to provide support to SHAP activities in 2017.

ROLES AND RESPONSIBILITIES OF SERVICES TO BE PROCURED

Job Challenges for all Roles:

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 a range of communication channels including phone, email and social media to reach out to SHAP stakeholders and the SHAP network.

To help build the SHAP network nationally.

To meet stringent compliance requirements by funders in project delivery processes and evidence of compliant activity.

To be able to work to tight deadlines and respond to unprogrammed demands for time and outputs.

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

JOB DESCRIPTIONS AND PERSON SPECIFICATIONS FOR THE 3 LOTS TO BE PROCURED THROUGH THIS TENDER

LOT 1: PROGRAMME & PROJECT MANAGER

This role works with and reports to the SHAP Co-ordinator and provides management oversight to the programme of SHAP projects and project management of individual projects as required. This post may be part funded by one or more SHAP projects and will need to ensure that all projects deliver to time, to budget and in compliance with funders requirements. This role requires awareness of and interest in a wide range of housing related issues including:

- the UK housing sector including social housing, private rent and private ownership and the housing supply chain;
- fuel poverty;
- energy efficiency retrofit;
- UK energy system transformation;
- low carbon and climate change;
- new build standards;
- procurement;
- financial modelling;
- behaviour change;
- public health related to housing;
- sustainable construction;
- sustainable development;
- research and innovation;
- UK housing regulation;
- Placemaking and the low carbon whole place agenda

Duties

1. Overall Programme management of the SHAP workstreams including budgetary management and reporting, liaising with the SHAP co-ordinator and the panel of Technical Project Leads
2. Project management of SHAP projects as required, liaising with the SHAP co-ordinator and the panel of Technical Project Leads
3. Desk based research including production of technical briefings on topics agreed with the SHAP co-ordinator
4. Production of survey and dissemination materials as agreed with the SHAP co-ordinator
5. Manipulation of statistical data
6. Engage with SHAP Sponsors and Members on Programme and project related activity
7. Disseminate SHAP project/research outcomes, including the preparation of publications and social media.
8. Preparation of draft research reports
9. Liaison with the SHAP Board when requested by the SHAP co-ordinator
10. Other tasks within the scope of the role

Person Specification

See section below (Page 12)

LOT 2 - PROGRAMME ADMINISTRATOR

This role reports to the SHAP co-ordinator and works with the Programme & Project Manager and the panel of technical project leads. This post may be part funded by one or more SHAP projects.

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, the Programme Manager and the technical project leads
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 the sustainable housing agenda, ERDF and Interreg:
 - 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.
10. comply with data protection processes
11. Other tasks within the scope of the role

These tasks will involve the ability to:

- use a word processing package such as Microsoft Word
- write letters
- deal with telephone and email enquiries, using an email system (e.g. Outlook)
- photocopy and print various documents, sometimes on behalf of other colleagues
- organise and store paperwork, documents and computer-based information
- create and maintain filing and other office systems
- keep diaries and arrange appointments
- schedule and attend meetings, create agendas and take notes
- book meeting room and conference facilities
- liaise with external contacts
- order and maintain stationery and equipment

- organise travel and accommodation for the SHAP co-ordinator
- use a variety of software packages (including Excel, Access and Powerpoint) to manage data and produce documents and presentations
- use content management systems (CMS) to maintain and update websites and internal databases
- manage and maintain budgets and carry out invoicing
- sort and distribute incoming post and organise and send outgoing post

Person Specification

See section below (Page 14)

LOT 3 - TECHNICAL PROJECT LEAD

This role works with and reports to the SHAP Co-ordinator and the Programme & Project Manager. This post provides technical support to project delivery based on specific skills sets and areas of expertise required for successful delivery of the project objectives and outcomes. This role will be responsible for technical support to a specific SHAP project or number of projects and will need to work with the Programme & Project Manager and SHAP co-ordinator and Administrator to ensure that the relevant projects deliver to time, to budget and in compliance with funders requirements.

Technical services are required for a range of housing and low carbon related topics including but not restricted to those identified in the matrix below. On your tender submission please indicate on the matrix which services you can deliver and add any other relevant service areas. Three to six panel members will be appointed, with at least one from each of the 3 topic areas.

TOPIC AREA 1	TOPIC AREA 2	TOPIC AREA 3	OTHER
HOUSING POLICY and REGULATION Including:	LOW CARBON TECHNOLOGIES, SUSTAINABLE CONSTRUCTION AND DESIGN, CIRCULAR ECONOMY Including:	PROCUREMENT, BUSINESS CASE DEVELOPMENT, FINANCIAL MODELLING Including:	(please add other service areas you can offer) Including:
Building regulations	Energy system transformation	Smart and sustainable procurement (procurement for outcomes)	
Planning	Renewable energy technologies	Financial modelling and Business case development	
Fuel Poverty	Deep retrofit	Finance mechanisms for all housing tenures	
Health and wellbeing	New build housing standards and modern methods of construction		
	Land remediation		
	Circular economy		

Duties

1. Liaise with the SHAP Co-ordinator and Administrator and SHAP Programme and Project Manager regarding specific project objectives, reporting requirements, deadlines, budgets, contracted outputs
2. Liaise with other Technical Project Leads as the project activity requires

3. Provide the technical services required by the project to which you will be appointed
4. Carry out desk based research including production of technical briefings on topics agreed with the SHAP co-ordinator
5. Produce survey and dissemination materials as agreed with the SHAP co-ordinator
6. Manipulation of statistical data
7. Engage with SHAP Sponsors and Members on Programme and project related activity
8. Disseminate SHAP project/research outcomes, including the preparation of publications and social media.
9. Preparation of draft research reports
10. Liaise with the SHAP Board when requested by the SHAP co-ordinator
11. Carry out other tasks within the scope of the role

Person Specification

See section below (Page 12)

PERSON SPECIFICATION – LOTS 1 AND 3

Job Title: SHAP PROGRAMME AND PROJECT MANAGER And TECHNICAL PROJECT LEAD		
Qualities	Essential or desirable	Method of assessment
Scoring: Qualifications, Knowledge and Skills – 20%		
Qualifications Degree or equivalent professional qualification	Essential	Evidence of qualification
Knowledge and Skills Demonstrate an excellent working knowledge and delivery experience of grant funded projects including those receiving UK public grant and European funding Demonstrate practical experience of project delivery with demonstrably successful outcomes Demonstrate a working knowledge of one of more topics including: the UK housing sector including social housing, private rent and private ownership, fuel poverty, energy efficiency retrofit, low carbon and climate change, new build standards, procurement, financial modelling, behaviour change, public health related to housing, construction	Essential Essential Essential	Covering letter, CV and Interview (if held)
Scoring: 20%		
Experience Excellent project management skills and strong evidence as working as part of a team Excellent budget handling skills Experience of funding regimes, systems and procedures including ERDF, Interreg and Horizon 2020 and UK national, local and devolved authority funding regimes. Previous experience of working within the housing sector providing technical support to deliver the required project	Essential Essential Essential for the Programme and Project Manager, desirable for Technical Project Leads Essential for technical	Covering letter, CV and Interview (if held)

outcomes	project leads	
Experience of developing funding bids with successful outcomes leading to funding being secured	Desirable	
Scoring: 5%		
Judgment / Decision Making		
To show a discernment in knowing when to ask for help and guidance, but also in holding your ground to achieve better project outcomes	Essential	Covering letter, CV and Interview (if held)
To show an attention to detail and ability to ensure you and others comply with that detail	Essential.	
Able to negotiate and influence to deliver results and build long term relationships with key stakeholders	Essential	
Self-motivated and able to work on own initiative with drive, enthusiasm and determination	Essential	
Scoring: 5%		
Customer Care / Interpersonal Skills		
To show an ability to professionally represent SHAP in all dealings with external organisations and stakeholders	Essential	Covering letter, CV and Interview (if held)
To work methodically and independently on own initiative, and as part of a team	Essential	
Commitment to providing high quality services	Essential	
Able to create and maintain working partnerships and relationships, both internally and externally	Essential	
Commitment to the vision and values of SHAP		
Commitment to equality and diversity in all aspects of SHAP work	Essential	
Scoring: 5%		
Service Development / Finding Solutions		
Skills for partnership working including networking, collaboration, problem solving and negotiation – able to build good relationships	Essential	

and working practices		
Ability to express complex situations in a way that is appropriate for the audience	Essential	Covering letter, CV and Interview (if held)
An openness and willingness to learn, and to take people with you	Essential	
Scoring: 5%		
Other Factors		
Flexible attitude to working hours and the ability to attend evening and weekend meetings/ events	Essential	Covering letter, CV and Interview (if held)
Computer literate	Essential	

PERSON SPECIFICATION – LOT 2

Job Title: SHAP PROGRAMME ADMINISTRATOR		
Qualities	Essential or desirable	Method of assessment
Scoring: Qualifications, Knowledge and Skills – 20%		
Qualifications Professional qualification in office management and computer software GCSE English or Maths at grade C or equivalent level 2 qualification or qualified by experience to equivalent level	Desirable Essential	Evidence of qualification or equivalent experience
Knowledge and Skills Good IT skills which include the ability to confidently use all Microsoft Office applications. Excellent administration and organisational skills including setting up and maintaining office management processes Working knowledge of Wordpress, electronic communications and social media Demonstrate practical experience of project delivery with demonstrably successful outcomes The ability to accurately identify and gather relevant information and organise it into a usable format for analysis. The ability to adhere to deadlines and targets. The capability to respond quickly to changes that will impact upon service delivery.	Essential Essential Essential Desirable Essential Essential Essential	Covering letter, CV and Interview (if held)
Scoring: 20%		
Experience Excellent project administration skills and strong evidence as working as part of a team Excellent budget handling skills	Essential Desirable	Covering letter, CV and Interview (if held)

Experience of funding regimes, systems and procedures including ERDF, Interreg and Horizon 2020 and UK national, local and devolved authority funding regimes.	Desirable	
Scoring: 5%		
Judgment / Decision Making To show a discernment in knowing when to ask for help and guidance, but also in holding your ground to achieve better project outcomes To show an attention to detail and ability to ensure you and others comply with that detail Able to build long term relationships with key SHAP stakeholders Self-motivated and able to work on own initiative with drive, enthusiasm and determination	Essential Essential. Essential Essential	Covering letter, CV and Interview (if held)
Scoring 5%		
Customer Care / Interpersonal Skills To show an ability to professionally represent SHAP in all dealings with external organisations and stakeholders To work methodically and independently on own initiative, and as part of a team Commitment to providing high quality services Able to create and maintain working partnerships and relationships, both internally and externally Commitment to the vision and values of SHAP Commitment to equality and diversity in all aspects of SHAP work	Essential Essential Essential Essential Essential	Covering letter, CV and Interview (if held)
Scoring: 5%		
Service Development / Finding Solutions Skills for collaboration and problem solving– able to build good relationships and working practices An openness and willingness to learn, and to take people with you	Essential Essential	Covering letter, CV and Interview (if held)

Scoring: 5%		
Other Factors Flexible attitude to working hours and the ability to attend evening and weekend meetings/ events An interest in climate change, sustainable development, housing	Essential Desirable	Covering letter, CV and Interview (if held)

ANNEX 1 – EVALUATION AND SCORING METHODOLOGY

The contract will be awarded on the basis the ‘Most Economically Advantageous Tender’ (“MEAT”) which balances cost against other considerations.

The Assessment Criteria are:

Price	40%
Quality	60%

Price

This will be evaluated on the hourly rate provided. This should be inclusive of VAT (if applicable) The working base is considered to be within the West Midlands. No travel costs to the West Midlands or within the West Midlands will be paid. The hourly rate should therefore include an element for all travel costs and other expenses for attendance at workshops and events at locations across the West Midlands, unless otherwise agreed.

Costs to attend meetings outside the West Midlands and for any overseas events must be agreed in advance and will be paid in addition to the day rate.

Travel time is not paid.

See the scoring methodology below for the price element

See the scoring methodology below for the price element

Quality	60%
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Evaluation of the quality elements will be scored out of a total of 60 points, broken down as shown below

Qualifications, knowledge and skills	20%
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Evidence – qualifications, professional body membership, CV, interview if held, other supporting evidence

Experience and track record	20%
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Evidence – CV, interview if held, other supporting evidence

Judgment / Decision Making, Customer Care / Interpersonal Skills, Service Development / Finding Solutions	15%
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Evidence – CV, testimonials, tender covering letter, interview if held, other supporting evidence

Added value (not identified elsewhere)	5%
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e.g. in depth specialist experience, professional award, relevant experience not identified elsewhere

See the scoring methodology below for the quality element

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 £100/hr] and another tenderer bids £125/hr then the £100/hr bid will receive a score of 40 out of 40. The score for the £125/hr bid, being 25% higher than the lowest tender, will reduce by 25%, therefore receiving a score of 30 out of 40.*

ANNEX 2 - ABOUT SHAP

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)

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.

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.

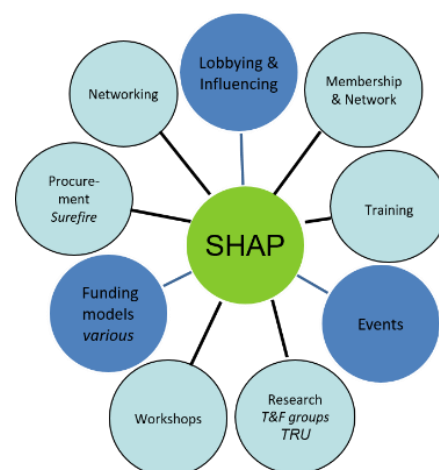
SHAP was originally set up by Sustainability West Midlands as a Regional Development Agency project but now provides services across England and is recruiting new Welsh and Scottish Members.

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.