



# A New Shading Vernacular for a Changing Climate

Development of new guidance and case studies exploring challenges facing the housebuilding industry due to a changing climate, focussing on the need for a change in design approach to make shading devices the norm for both existing homes and new housing development

**Invitation to Tender (ITT) – Guidance for Tenderers**

**Prepared by:** Good Homes Alliance (GHA) and British Blind and Shutter Association (BBSA)

**Date:** 13/03/2023

**Version:** 2

## Table of Contents

<b>About the guide</b> .....	<b>3</b>
Summary.....	3
Why is it needed? .....	3
Timeframe .....	3
<b>About the project partners</b> .....	<b>3</b>
Good Homes Alliance (GHA) .....	3
About the British Blind and Shutters Association.....	3
Why are GHA and BBSA well placed to commission this guide? .....	3
<b>Tender information</b> .....	<b>4</b>
Budget.....	4
Eligibility .....	4
Proposed topics/chapters.....	4
Audience .....	5
Governance.....	5
Outputs.....	5
Instructions on writing format/tone.....	5
Tender process.....	5
Evaluation criteria.....	6
Assessment panel .....	6
Timescales for application.....	6
Intellectual property.....	6
<b>Further information and enquiries</b> .....	<b>7</b>

## About the guide

### Summary

Development of new guidance and case studies exploring challenges facing the housebuilding industry due to a changing climate, focussing on the need for a change in design approach to make shading devices the new ‘vernacular’ for both new and existing homes.

The guide follows on from popular industry guidance developed by Good Homes Alliance on minimising and mitigating overheating risk in homes.

### Why is it needed?

Feedback from within the Good Homes Alliance membership (which include consultants, architects & specifiers, local authorities, housing associations and private developers) was that guidance on how to effectively use shading devices to reduce overheating risk, as well as positively impact other health & wellbeing/occupant comfort and building performance benefits, would be extremely well received.

### Timeframe

3-6 months, proposed May 2023 start date.

## About the project partners

### Good Homes Alliance (GHA)

[Good Homes Alliance](#) – A sustainability organisation with a focus on net zero, new build homes. Membership network of 100+ members from across industry including architects and consultants, plus 35+ local authorities, housing associations and private sector developers, who are set to build 120,000 new homes over the next 10 years.

The GHA is primarily a knowledge sharing and networking organisation with a focus on net zero homes, health & wellbeing, placemaking and more.

### About the British Blind and Shutters Association

[British Blind and Shutter Association \(BBSA\)](#) – A national trade association with 500+ members that manufacture, supply and install interior and exterior blinds, awnings, security grilles and shutters and associated motor and control systems.

### Why are GHA and BBSA well placed to commission this guide?

GHA has a track record of commissioning popular industry guidance, all freely- available, including:

- Overheating in [new build homes](#) (July 2019, now recommended by Greater London Authority in their energy assessment guidance)
- Overheating in [retrofit](#) and existing homes (Sept 2022)
- [Part O](#) of the Building Regulations (July 2022, for Future Homes Hub)
- [Comparison of building standards](#) (October 2020)

BBSA has produced a wide range of information on solar shading including industry guidance notes, product specific guides, research and reports and information on BS/EN/ISO standards.

With their colleagues in the European Solar Shading Organisation, BBSA is actively engaged with CEN and ISO in improving existing and developing new standards relevant to product performance. They are also engaged in research with leading international laboratories.

## Tender information

### Budget

The proposed budget is £15,000 plus VAT, with the intention that this be paid in three instalments according to agreed project milestones (e.g. on signing the contract, delivery of the interim draft guide and the final outputs to an acceptable quality standard).

We would be happy to consider bids that involve match-funding or co-funding, and for research teams to consider how leveraging in additional funding could extend the scope of the project.

### Eligibility

Tenders are invited from consultancies, architectural practices, universities, research bodies and consortiums who have strong expertise of shading and wider aspects such as design, specification, regulations (i.e. Part B, Part O), planning, and technical performance aspects (i.e. energy modelling).

We welcome tenders from diverse teams. We strongly welcome applications which include at least one GHA member on the team and ask that applicants list all of their team members indicating who is a GHA member.

### Proposed topics/chapters

The proposed topics/chapters to be covered in the guide include:

1. The issues/challenges facing housing developers and the need for shading (e.g. heatwaves, summer overheating, cold winters).
2. Drawbacks of current design approaches (i.e. a desire for natural light/high amounts of glazing with less regard for heat gain/glare issues).
3. What role can shading play – Examples of types of shading devices and their benefits (for a range of housing types and different climates).
4. Increased uptake of shading devices and the implications of this on design for UK housing.
5. How to specify an effective shading solution (e.g. consider the effect of fabric and glass together, fixing points and power requirements for automated shading systems, planning for concealment, maintenance, standards etc.)
6. The role of automation for dynamic control of shading devices.
7. Internal vs external shading, and when both solutions are necessary (e.g. external for primary heat rejection and internal for light control).
8. Barriers to shading in conservation areas, vernacular buildings etc.
9. What role can Part O and planning policy play (both positive and negative); and the opportunities for shading devices as an appropriate solution to Part O.

10. Part B implications for shading products above ground floor on tall buildings
11. UK supply/manufacturing opportunities.
12. Best practice solutions and case studies – From the UK but also learning from best practice internationally where appropriate.
13. Resilience and futureproofing – Provision for future shading (e.g. wiring and fixing points for shading installation in the future when required).
14. Appendix: Model specifications/Employers Requirements.

## Audience

The key audiences for this work are:

- Architects/designers/specifiers
- Local authorities - planning departments and building control
- Housing associations/RSLs
- Private developers/housebuilders
- Policy makers - Local and national level

## Governance

- The commissioning client for this project is the Good Homes Alliance (GHA) and British Blind and Shutter Association (BBSA).
- External funding support for the project is kindly received by Louvolite, Caribbean Blinds and Guthrie Douglas.
- A steering group will act as an advisory group for this project and will consist of GHA board members/executive team, BBSA executive team, sponsors and invited experts.

## Outputs

- A comprehensive and clearly written guide in a common format such as Word or InDesign with supporting illustrations, photographs and infographics.
- Summary slide deck to present the guide as learning/training materials to GHA members and wider industry.

## Instructions on writing format/tone

- Third person present tense (**not** first person, e.g. “I think that...”).
- Write in a factual and non-commercial way. Avoid ‘salesy’ language and reference to brand/product names as much as possible (these can be mentioned in case studies).
- Evidence presented must be neutral and without bias. Write in an informative, non ‘opinion-based’ manner (i.e. not in a blog style).
- Free of jargon. If using acronyms or less commonly known terms, please provide a short description for use in the glossary.
- Include links and references as footnotes/endnotes or hyperlinked text.
- Do not make unsubstantiated claims and avoid ‘green-washing’.
- Keep text concise and make note of the proposed total word count for each section.
- Provide suitable images (with credits) or infographics. If necessary, GHA can help to source images.

## Tender process

Organisations/project teams should submit a tender document that includes:

- Proposed methodology, including regarding stakeholder engagement.
- Proposed outputs.
- Project team and general experience.
- Statement of experience relevant to the project, and selected projects that demonstrate relevant experience.
- Recommendations on how best to gain exposure for the guide and any added value the tenderer could bring in this regard.
- Total cost of the project.
- A budget breakdown between the stages.

### Evaluation criteria

Applications will be evaluated against five criteria:

1. Quality, rigour and depth of the proposed methodology and analysis
2. Experience/track record/knowledge of research relevant to the project
3. Experience of effective and impactful partnership working
4. Experience of managing potentially politically sensitive projects
5. Value for money

### Assessment panel

The assessment panel will comprise of board members and executive team staff members (Programmes Director, Projects Manager) from Good Homes Alliance, an executive team member from BBSA (Director of Operations) and members of the project steering group (to include sponsors and invited experts).

### Timescales for application

#### Applications should be submitted electronically to:

Richard Broad, Projects & Communications Manager: [richard@goodhomes.org.uk](mailto:richard@goodhomes.org.uk).

Applications should be received by no later than **5pm on Friday 7<sup>th</sup> April 2023**.

If required, we would intend to interview a shortlist of bidders during the weeks commencing 10<sup>th</sup> or 17<sup>th</sup> April 2023 and to appoint the successful research team by week commencing 24<sup>th</sup> April 2023 to begin the work in the first week of May.

### Intellectual property

The Good Homes Alliance and BBSA will retain ownership of the work but may grant the researchers the right to publish and re-use the material submitted to GHA/BBSA and will be fully credited for their work. Researchers and institutions should not apply if they will not be able to agree to this provision. The researchers should acknowledge the support from the GHA/BBSA in any subsequent publications and activity based on the supported projects.

## ***Further information and enquiries***

We welcome enquiries about this project. As appropriate, responses may be issued as anonymised Q&As to all those who have notified us of their intention to bid.

Please contact:

**Richard Broad**

Projects & Communications Manager, Good Homes Alliance

[richard@goodhomes.org.uk](mailto:richard@goodhomes.org.uk)

0330 355 6275 / 07391 003 193