



# Building Performance Evaluation Guidance (Modules 4 + 5)

Development of two online guidance modules on 'Data interpretation, reporting and taking action' and the 'Performance golden thread'

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

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## About the guide

### Summary

Development of new guidance and case studies exploring different techniques and approaches used by building performance evaluation (BPE) practitioners.

The guide follows on from three BPE training modules released over the previous two years and will form modules 4 and 5 of a five-part BPE training materials package. Modules 1-3 have already been published, and are available on the Building Performance Network website:

1. [Building Performance Evaluation: what, why and the benefits that it brings](#)
2. [Planning BPE: where to start and common techniques](#)
3. [Undertaking dwelling BPE](#)

### Why is it needed?

Feedback from within the Good Homes Alliance membership and Building Performance Network practitioners (which include BPE practitioners and equipment manufacturers, consultants, architects & specifiers, local authorities, housing associations and private developers) was that guidance on how to effectively use BPE techniques would be extremely well received. This information should be accessible to anyone involved in BPE, from experts to laypeople interested in learning more about BPE.

### Timeframe

3-4 months, starting January/February 2025.

## Tender information

### Budget

The proposed budget is £7,000 plus VAT for the production of both modules, with the intention that this be paid in two instalments according to agreed project milestones (e.g. on signing the contract and delivery of the final outputs to an acceptable quality standard).

### Eligibility

Tenders are invited from consultants, architectural practices, academics and more, who have strong expertise of building performance evaluation.

### Proposed topics/chapters

**Outline for module 4:** Data interpretation, reporting and taking action.

*High level overview:*

- Taking the core activities from Module 3: Undertaking Dwelling BPE and elaborating on what data will be collected and what it means.
- Outline each quantitative and qualitative test, further describe metrics and actions to be taken to improve performance.
- Continue to refer to BPN wheel (RIBA stages – see [Module 3](#), p. 6) and to BS 40101 where relevant.

*Example content:*

- Monitoring and data approach
- Frequency of recording and measurement
- Data collection strategy
- Short-term measurement data
  - Envelope airtightness
  - Ventilation system operation
  - Fabric performance
- Long-term monitoring data
  - Dwelling performance – drivers and measurements (recap from Module 3)
  - Solar water heating
  - Photovoltaics
  - Heat pumps
  - Other tech (heat storage etc.)
- Handling occupant data
  - GDPR and personal data, data retention
  - Using occupant data with performance data
- Climate data
- Approaching data analysis – what do you do with the data you have?
  - Interpretation and presentation of results
  - How do you take action
  - Embedding lessons learnt
- Co-operation from developer/ contractor
- Indication of monitoring costs
- Monitoring a portfolio of buildings (e.g. the impact of the number of dwellings monitored)

Content should relate/signpost to modules 1 and 2 for background information and 3 for information on techniques whenever relevant.

The completed document should be around 15 to 20 pages of content.

**Outline for module 5:** The performance golden thread: BPE and robust QA

*High level overview:*

- How to maintain the performance golden thread through the design, build, commissioning through to in-use including how building performance evaluation supports a robust QA process
- In-use and performance verification
- Signposts in-use building performance evaluation technique guidance on methods and innovative products introduced by a descriptive narrative
- Signpost templates for communicating design assumptions and performance targets to aid information flow between clients, builders and energy assessors
- Signpost resources that describe how assumptions are delivered.

The completed document should be around 15 to 20 pages of content.

## Audience

The key audiences for this work are:

- BPE practitioners
- 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).
- External funding support for the project is kindly received by Ecology Building Society.

## Outputs

- Two clearly written guides (15-20 pages per guide) provided in a common format such as Word or InDesign with supporting illustrations, photographs and infographics.
- If required, GHA can support with InDesign formatting and layout. It is expected that the format of the two guides will follow the same/similar format/layout to the first 3 guides.

## 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 short tender document that includes:

- Proposed methodology and guide contents.
- Statement of experience relevant to the project.
- Fee schedule.

## 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 the executive team staff members from Good Homes Alliance.

## Timescales for application

We require applications to be submitted by 17<sup>th</sup> January 2025.

If required, we would intend to interview a shortlist of bidders towards the end of January and to appoint the successful author to start work in February 2025.

## Applications should be submitted electronically to:

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

## Intellectual property

The Good Homes Alliance will retain ownership of the work but may grant the researchers the right to publish and re-use the material submitted to GHA 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 in any subsequent publications and activity based on the supported projects.

## Further information and enquiries

Please contact:

**Richard Broad**

Projects & Communications Manager, Good Homes Alliance

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