

Bristol Community Land Trust - Shaldon Road Development:

Self Finish Project Management Team Tender

Bristol Community Land Trust (**BCLT**) and United Communities (**UC**) are looking for an individual or team with experience of self build or self finish construction work to manage the self finish programme and oversee and support the work of the self finish residents group at its Shaldon Road scheme in Bristol, which will start on site in early 2018.

Proposal & quote

Please submit a proposal responding to each objective and fee quote for each phase, along with a personal statements how you/your team fits the role specification drawing on your experience to date, including:

- You should identify the hours you/your team would expect to put in and when, both before starting on site and during the build period.
- Include the name, email address and contact number of two previous employer/contractor who you would be happy to provide a reference.

We will notify successful bidders within two weeks of the deadline and invite them for interview.

Please email your proposal and any supporting material to
RiannanM@unitedcommunities.org.uk by 14th December 2017.

If you require clarification or additional information such as site plans and design information, please contact the Project Manager, Darren Hall darren@thepaleblue.org

Background

The Shaldon Road development is being delivered by two partner organisations, the Bristol Community Land Trust (BCLT) and United Communities (UC) housing association. The project management of the development is currently overseen by the Shaldon Road Project Group (SRPG) comprising representatives from both organisations.

Bristol CLT is a Community Land Trust (**CLT**), which launched in 2011. A CLT is a non-profit, community-based organisation that develops housing or other assets at permanently affordable levels for long-term community benefit. BCLT's aim is to provide affordable housing in the Bristol area to those who cannot afford open market properties but are unlikely to qualify for social housing. BCLT has around 500 members and has a number of projects in the pipeline.

As well as affordable housing, Bristol CLT intends to acquire other land and buildings to meet community needs including:

- Work space
- Community facilities
- Allotments
- Growing space
- Recreation land

United Communities (**UC**) is a housing association which works tirelessly to meet the need for affordable homes in a way which will help to regenerate their core communities and work with their residents, to provide More Than Just A Roof.

UC has a number of core priorities.

1. Develop an additional 500 homes over the next 5 years, of which at least 70% will be affordable and within their target communities.
2. Sustain at least 75% of their existing homes as rented and affordable.
3. Develop and manage all types of housing and property if this helps to achieve their purpose.
4. Proactively make the best use of all their properties to maximise the provision of new homes.
5. Be efficient in everything they do, so that they can dedicate up to 20% of our surplus to provide residents with More Than Just a Roof.
6. Focus our More Than commitment on outcomes in their communities which make full use of resident's skills and aspirations.
7. Listen to their staff and residents so that they feel valued and have an effective voice in the strategic decisions we make and can co-design our services.

Shaldon Road

This is BCLT's second construction project in Bristol, and continuing collaboration with UC has proved a unique partnership. Reference to the delivery organisation for this project will be the Shaldon Road Project Group (**SRPG**). Though the board of each organisation make key decisions on delivery.

After four years of consultation with local residents and input from BCLT members, SRPG team has achieved planning permission (Ref: 17/01920/F) for a mixed tenure, sustainable community development of 49 dwellings and two common houses.

The approved layout comprises a mix of flats, maisonettes, two, three and four bed houses. The two bed houses will be two-storey with the remainder being three-storey. They will be modern in appearance with a mix of timber cladding and coloured render. One common house will be located towards the centre of the site and may be built after the completion of the residential units; the other common house is located to the south, and will include a workshop that can be used as a training venue for the project participants.

24 of the dwellings will be owned and managed by United Communities; the other 25 will be owned by BCLT but also managed by United Communities. The dwellings will be in a mix of affordable rent and shared ownership.

The BCLT Board and the UC Board are committed to involving members and future residents in the completion of their own homes on this project. A self-finish approach, based on prior completion on the main structural elements by a contractor, proved very successful in BCLT's first project of 12 homes at 325 Fishponds Road and we wish to use this process again, on a larger scale, for Shaldon Road.

SRPG team is currently engaging in an allocations process to select applicants wishing to purchase or rent homes at Shaldon Road and who are prepared to undertake some of the construction process themselves by working collectively. This commitment is likely to be between 8-12 hours per household per week for a twelve-month period. Heads of Terms for the future residents need to be created and agreed by the SF team and residents group, as a contract that the self-finishers will agree to and sign. A specification for the works they will undertake has been drafted, although this may be subject to change if required (see Appendix III). A skills audit will be required to assess the self-finish development group's range and level of skills.

The BCLT Board expects the value of the self-finish element of the works (i.e. the sweat equity that can be earned by each household by carrying out the specified works) to be between £5000-£10,000 per home.

The Self Finish Project Management Team (**SFPM**) will play a key role in this project, assisting the SRPG to keep the project on schedule and to budget, and ensuring that it fully meets the undertakings given to the Homes and Communities Agency relating to funding. Just as importantly, the team will also provide support and motivation to the group of residents involved in the construction of their own homes.

Timetable

The following outline timetable is subject to confirmation with the contractors:

- Main contractor start on Site: Feb 2018
- Enabling/Ground Work/Demolition: March – May 2018
- Construction: May 2018 – May 2019
- Self finish of homes (phased delivery) & garden landscaping up to 'completion' standard: September 2018 – June 2019
- Additional self-finish external works and landscaping: June – December 2019

Role Description & Objectives

The Self Finish Management Team would will be wholly responsible for the management and implementation of Self Finish of the Shaldon Road. In order to support the future residents in their self finish element of the development, and to manage the risk of the self-finish works falling behind schedule or not being completed to the required standard, the SRPG would like to put in place a self-finish management process. While this role could be carried out by a single person, given the scale of the project BCLT anticipates that it may need to be carried out by a team.

The overall aim is to create a cohesive, respectful, sharing community where each and every member's contributions and needs are acknowledged and appreciated. It is not a competition to see who can do the most, through their own endeavours or those of their friends & family, but a process of mutual trust and support where the overall output is greater than the sum of the parts.

The key objectives of the contract are as follows:

Prior to the self-finishers starting on site (Phase 1):

1. Produce a detailed project plan and programme to be agreed with the SRPG in consultation with Shaldon Road Residents Group (**SRRG**)and main contractor ;
2. Produce and agree a self-finish contract document which sets out the requirements and conditions of involvement for the self-finishers.
3. Manage and deliver a skills audit for the residents once they have been allocated.
4. Produce and manage appropriate training programme for group members, based on the results of the skills audit and site safety requirements
5. Liaise with the main contractor to ensure the plan for procurement and delivery of materials will meet the project requirements

6. Lead in establishing procedure and agree with the SRPG to performance manage group members to work within the agreed minimum & maximum monthly limits, and in particular those who fail to complete sufficient hours on site and who may have to receive warnings (potentially escalating to a decision by the Board of BCLT to allocate the home to another BCLT member)
7. Support the self finish group in applying for funding or creating a crowd fund so that the central common house and other 'nice to have' features can be constructed
8. Self Finish budget including phased cashflow to be created.

Written monthly report provided to SRPG, to make available for their Boards.

Whilst the self-finishers are on site (Phase 2):

8. Design and maintain a record keeping system (potential use of online technology) to ensure comprehensive records of the time spent and the work undertaken on site by individuals each week in relation to their signed undertakings;
Manage Self Finish budget providing monthly reporting.
9. Ensure that the working drawings, planning conditions relating to construction, and specifications are adhered to;
10. Ensure that all construction work is undertaken to the required quality and standards, and in accordance with the Building Regulations;
11. Ensure that the site is well managed, clean and tidy, and that the activities do not cause undue nuisance to near neighbours;
12. Ensure that health and safety regulations are adhered to;
13. Support the self-finish group to source materials required for the self-finish landscaping works on paths and gardens. These materials could be acquired through donations from trade bodies, re-using or re-cycling materials, crowd sourcing, fund raising activities etc;
14. Record the self finish development group process through photos, interviews, blog etc.
15. Ensure that the self-finish process does not impact building control sign-off
16. Ensure each unit is completed as per the agreed programme ready for hand-over or shared equity sale

Written monthly report provided to SRPG, to make available for their Boards.

Post practical completion (phase 3)

17. Manage the completion of additional external works & landscaping
18. Complete the calculations for determination of the sweat equity earned
19. Written monthly report provided to SRPG, to make available for their Boards.
20. Finalise Self Finish budget.

Handover back to BCLT with all records and actions complete.

Role Specification

The individual or team applying for this role should demonstrate the following skills and experience.

Essential:

- Knowledge and understanding of the nature of the self build or self finish process.
- Experience of managing programmes and budgets.
- Project management experience.
- Ability to maintain good working relationships, especially in times of pressure or difficulty
- Able to work outside office hours when necessary, both in the evenings and at weekends.

Desirable:

- Experience in one or more construction trades.
- Demonstrable experience in managing self build, self finish or community-led build projects.
- Experience of materials sourcing around Bristol and other relevant local knowledge.
- Training for trainers accreditation.
- Links with completed self-build projects.

Appendix I

Example Heads of Terms for agreement with self-finishers

Working as a team

1. Self finishers will work together as a team to complete the homes. The overall aim is to create a cohesive, respectful, sharing community where each and every member's contributions and needs are acknowledged and appreciated. It is not a competition to see who can do the most, through their own endeavours or those of their friends & family, but a process of mutual trust and support where the overall output is greater than the sum of the parts.

Agreement to rent or to sell

2. BCLT will allocate homes to named individuals within one month of start on site and will commit, either to enter into an assured short hold rental agreement for the rented homes or to sell shared ownership homes subject to an equity mortgage with named individuals provided a) at the point where the self-finish work is required, those individuals agree to commit to and abide by the terms of the self-finish agreement and b) in the case of the shared ownership purchasers their financial circumstances and ability to make the purchase have not changed.

Value of equity earned

3. For the purposes of calculation, the estimated value of the equity to be earned per home is £7,500. It is estimated that up to 500 hours of work will be required for each household, generally involving 15 hours work per week. However the overall equity earned will be determined based on the works being completed and not on the basis of the number of hours worked.

5. The number of hours of work undertaken by each individual will be logged on site. It is recognised that some individuals may work faster or have more experience or skill than others. In principle the intention is that all contributions should be equal but BCLT reserves the right to decide that some individuals should be awarded more or less equity than average if their contribution is significantly above or below the average. In doing so they will consult with the self-finishers as a group and take account of their opinions and suggestions.

6. Individual self-finishers may reach agreement with the others to undertake more or less of the work for appropriate transfers of earned equity between the parties.

7. The value of the equity earned will be calculated on the basis of the saving in labour costs using the priced specification of the contractors.

Quality of work

8. Equity will only be earned if the quality of the work is certified as satisfactory by the Employer's Agent. If, after any steps have been taken to ensure a satisfactory quality is achieved BCLT is of the opinion that the work remains deficient, BCLT will arrange to have the work completed or re-done by the contractor and the cost of doing so will be deducted from the total equity earned.

Timetable

9. Internal works for homes in each block must be completed according to an agreed timetable with a maximum time available from handover from and back to the contractor of three months. BCLT reserves the right to deduct from the total equity earned the cost of additional interest payments caused by any delay. If in BCLT's opinion progress in completing the work gives good reason to believe that it will not be completed on three months, BCLT reserves the right to halt the self-completion work and to employ a contractor to complete the scheme. Self-finish equity would only then be earned if the cost of completing the work was less than value of the self-finish work already completed.

Landscaping element

10. In order to achieve handover as soon as possible and enable the self-finishers to earn more sweat equity in their homes, BCLT intends that self-finishers should complete the landscaping part of the work after handover of the homes. A separate timescale will be established for this element and the penalties associated with delay will be established separately since in this case the delay does not impact on interest costs but it will be necessary to bring in a contractor to finish the work with a consequent reduction in equity earned if agreed timescales are not adhered to.

Penalties

11. In the event that any self-finish elements are not completed, the value of the remaining equity earned will be reduced by the actual cost of completing this element even if this is more than the contractor's price.

Method of allocating and paying equity earned

12. The equity allocated to shared ownership or equity mortgage purchasers using these principles will increase their share of ownership on completion of the sale of their home.

13. The equity allocated to future rental occupiers will be held by Bristol CLT and will result in BCLT borrowing less against the rental home than would otherwise have been the case. The rental charged could as a result either a) be lower or b) the tenant could choose to pay the same rent as would have been charged without the self-finish element (based on 80% of market rent at the time of completion as indicated by the Local Housing Allowance for a 1-bedroom home) on the basis that BCLT create a fund from the surplus rental income. When the rental tenant leaves they will be paid by BCLT the value of the equity they earned together with a sum related to the percentage uplift in rent since completion plus the sum of any surplus rent if the tenant chooses not to take the rent reduction.

Appendix II

Works to be completed by self finishers (detailed schedule to be agreed with client & contractors as part of phase 1)

Internal works:

- Painting and decorating
- Installing Kitchens cabinets
- Tiling
- Skirting
- Internal carpentry work
- Flooring

External works:

- Bike stores
- Bin stores
- Communal gardens/patios/porches etc
- Planters and raised beds
- Planting
- Play Space
- External social space
- Garden landscaping