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#### One Stop Shop (OSS)

#### Strategic Plan - Application Form

This form is the second part of the evaluation process. You must first pass the Prequalification Eligibility Checklist.

You will then be invited by SEAI to complete this form.

Please read the separate **One Stop Shop Registration Guidelines before completing this form**.

Please ensure you complete all sections in the following application form, supply all requisite supporting information / documentation and that the application is signed by an authorised representative of your organisation.

1. **Organisation Details**

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| **1. ORGANISATION PROFILE** | | |
| 1.1 | Name of the organisation requesting OSS status: | Click or tap here to enter text. |
| 1.2 | Contact name for enquiries about this  submission: | Click or tap here to enter text. |
| 1.3 | Contact position (Job Title): | Click or tap here to enter text. |
| 1.4 | Address: | Click or tap here to enter text. |
| 1.5 | Eircode: | Click or tap here to enter text. |
| 1.6 | Telephone number: | Click or tap here to enter text. |
| 1.7 | Fax number: | Click or tap here to enter text. |
| 1.8 | E-mail address: | Click or tap here to enter text. |
| 1.9 | Website address (if any): | Click or tap here to enter text. |
| 1.10 | Company Registration number: | Click or tap here to enter text. |

1. **Declaration**

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| I declare that to the best of my knowledge the answers submitted in this document and any supporting documentation forming this application are correct. I understand that the information will be used in the evaluation process to assess my organisation’s suitability to be registered as a One Stop Shop on SEAI programmes. | |
| Name: | Click or tap here to enter text. |
| Position (Job Title): | Click or tap here to enter text. |
| Date: | Click or tap to enter a date. |
| Telephone number: | Click or tap here to enter text. |
| Signature: | Click or tap here to enter text. |

1. **Overall Strategic & Operational Plan Evaluation**

The information you submit should be clear and in sufficient detail to enable the Sustainable Energy Authority of Ireland (SEAI) to understand, review, score and comment on the rationale and practicality of your planned business service delivery in respect of the processes outlined in the OSS Operational Guidelines.

This information must address the following items below and in the same order as they are listed.

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| **1.** **Vision & Mission for the Organisation(10 marks)** |
| Provide a view of your business plan and vision for the OSS business. This should include your visualisation for the business as you go forward and how the business will deliver to your customers and stakeholders.  Then describe the position of your business currently and how it will evolve and transform to deliver on the long-term vision and mission. |
| Click or tap here to enter text. |
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| **2.** **SWOT Analysis and Ongoing Risk Management Approach (15 Marks)** |
| You should provide an analysis of the various strengths, weaknesses, opportunities, and threats for your business as a One Stop Shop in the retrofit market. Response should include internal & external factors. This should include a full risk analysis including an environmental analysis of the business you are in, and mitigants that you have in place to deal with each of those risks.  You should outline your ongoing Risk Management Approach which should include:   * Management oversight and structure for reporting information to Senior Management * Risk Management policies and procedures * Control and Mitigation Procedures and ongoing risk management approach |
| Click or tap here to enter text. |

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| **3.** **Long-Term Goals and Capacity and Growth Plan (Max marks: 15)** |
| Describe your Two (2) years goals (SMART Goals) and how they align with your mission and vision statements. This should set out the various milestones, and describe markets, supply chain and operational growth and expansion plans, and how they will be achieved. Please break down figures into yearly objectives and how each will be achieved, measured and delivered upon. This should include a detailed action plan for growth and delivery in the business and should address the following matters:   * Strategic Plan for growth in numbers of home upgrades completed over 2-year period and how that relates to other information provided and current capacity * Marketing Plans for growth in engaging and capturing customers, describing routes to consumer engagement, and linkage with overall capacity plan. This should encompass approach to working with SEAI and other stakeholders’ promotion and marketing initiatives to support national strategies and targets for home energy retrofits * Resource growth plan - additional plans in order to achieve delivery growth (training, new hires, partnerships, different specialties) * Financial plan to facilitate growth and scaling * Operational plan Approach and plans for achieving economies of scale and feeding into the Just Transition [[1]](#footnote-2) |
| Click or tap here to enter text. |

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| **4.** **Approach to Service Delivery and Project Management Approach (Max Marks: 20)** |
| Please describe your approach to service delivery and project management including how you will market to and capture consumer interest, as well as onboarding and provide excellent and seamless customer service and project delivery. This should include:   * End to end project management approach * Management and integration of sub- contractors/ partners * Process Management and Improvement * Evaluation and Measurement including post-works customer satisfaction surveys * Customer Charter and approach to customer engagement, service and delivery. This approach should demonstrate the applicant’s commitment to excellent customer service, and detail its complaints, appeals and redress procedures, to include:   + Templates of formal contracts with homeowners, contractors, and where relevant obligated parties.   + Providing each homeowner with a fully transparent Customer Agreement including the Terms and Conditions, which should be signed by both the OSS and the homeowner and dated at the time of signing.   + providing homeowners with links to, or information on finance options for their upgrade project, and outlining any future plans to develop fully integrated financing offering to homeowners. * Process Improvement |
| Click or tap here to enter text. |

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| **5.** **Approach To QMS including Technical Quality (Max marks: 15)** |
| The OSS should provide an outline of their approach to Quality Management including:   * Documented quality management system and alignment with the principles of ISO9001 or equivalent to consider total quality processes including but not limited to technical quality * Evaluation and Measurement Plan * Previous inspection pass rates in SEAI or other relevant programmes and schemes   **\* Under the SEAI OSS programme there is a minimum requirement for the OSS to:**   * **Hold a recognised Quality Management Certification or have that in train** * **Have a full end-to-end Quality Management System in place** * **Provide quarterly QA/Audit Reports on the programme** |
| Click or tap here to enter text. |

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| **6.** **Resources (Technical & Other) (Max Mark: 15)** |
| Please provide an outline of your resource plan for the business both currently and within the planned growth phase. This should include an Organisational Chart indicating the proposed personnel and roles, indicating those that are fulfilled by named partners.  Within this outline, you should also ensure you describe the following:   * Define the Senior Management Team including the project lead * Skills of technical staff (adequacy of crews) breadth and relevant technical partnerships. What internal / external resources are in place to allow for the full suite of technical services required under the scheme guidelines * Indicate those resources with ultimate responsibility for quality assurance of projects * Relevant resources across Customer Engagement & Marketing, Finance, IT and Administration. What level of Senior Management and support staff are in place across non - technical areas * Adequacy of Segregation of duties * Please provide CV’s separately, as described in **Section 4 – “Mandatory Documentation”**   **\*\*Please refer to the OSS Registration Guidelines for advice on issues to consider in compiling the resource plan.** |
| Click or tap here to enter text. |

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| **7. Data Security, Storage and Disaster Recovery (10 marks)** |
| In the course of administering grant applications on behalf of Homeowners, an OSS will be responsible for the processing, archiving and safekeeping of a variety of original documents, forms and local computer records, while ensuring adherence to GDPR requirements.  Please outline the policies that apply to the management of customer data and the administration of grants at the OSS’s facilities to include data security for both digital and hardcopy records, incorporating restoration procedures and compliance with audit trail requirements.  An OSS must be able to accept, track, process, share and assure the required information and documentation on behalf of homeowners, suppliers and contractors, and where necessary provide this to SEAI in a suitable digital format that meets data and privacy requirements. An OSS must also have the capability to connect with and interact with SEAI grant management systems.  In the application form, therefore, the applicant should describe:   * IT system to manage and track enquiries, customers, contractors and other stakeholders at all stages of the retrofit journey * Processes to include continuous improvement focusing on challenges and identifying solutions * Track progress and report on KPIs, dashboard and reporting to SEAI * IT system to provide design solutions for the retrofit * Data Security policies and procedures, General Data Protection Regulations (GDPR) compliance, Data Storage, Retention and Destruction policies and procedures and Disaster Recovery policies and procedures * Segregation of Duties (identify and record who does what for accountability, where needed) * Support for homeowners who wish to engage and submit applications offline |
| Click or tap here to enter text. |

1. **Mandatory Documentation**

Please include the following documentation with your completed application form:

* **Please include CV’s for all key management personnel as well as those responsible for overall project management, quality assurance and oversight.**
* **Any key policy documents noted as part of Strategic and Operational Plan**

1. **Adjudication Criteria**

Applications will be evaluated using the following criteria.

**As well as meeting all of the minimum eligibility criteria, sufficient evidence must be submitted within the response document to demonstrate compliance with achieving the following criteria.**

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| **Criteria** | **Max Score** |
| 1. Vision and Mission | **10**  \*Minimum Score: 7 |
| 1. SWOT and Risk Management | **15**  \*Minimum Score: 9 |
| 1. Growth and Capacity Plans | **15**  \*Minimum Score: 9 |
| 1. Service Delivery and Project Management | **20**  \*Minimum Score: 14 |
| 1. QMS | **15**  \*Minimum Score: 9 |
| 1. Resources | **15**  \*Minimum Score: 10 |
| 1. Data Management | **10**  \*Minimum Score: 7 |
| **Total** | **100**  \*Minimum Score: 65 |

**\* In all cases, SEAI reserves the right to reject an application by an OSS applicant in the event that any of the above criteria are not met.**

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| Scoring Bands | Scoring Methodology Meaning | |
| 4 | **(76 — 100% of Maximum Available Marks)** | **Meets all of the requirement to a high level: The Organisation’s proposal is assessed as meeting all elements of the stated requirement and as demonstrating a high to very high level of quality, detail, clarity, credibility and understanding.** |
| 3 | **(51 — 75% of Maximum Available Marks)** | **Meets all of the requirement: The Organisation’s proposal is assessed as meeting all elements of the stated requirement and as demonstrating an acceptable to good level of quality, detail, clarity, credibility, and understanding.** |
| 2 | **(26 — 50% of Maximum Available Marks)** | **Meets the majority of the requirement: The Organisation’s proposal is assessed as meeting the majority, but not all of the elements of the stated requirement, or is lacking in some elements of quality, detail, clarity, credibility or understanding.** |
| 1 | **(1 — 25% of Maximum Available Marks)** | **Meets some of the requirement: The Organisation’s proposal is assessed as meeting only some of the elements of the stated requirement, but not the majority and is lacking in a number of elements of quality, detail, clarity, credibility or understanding.** |
| 0 | **0% of Maximum Available Marks** | **No answer/does not meet requirement: Response is assessed as not appropriately meeting any of the elements of the stated requirement.** |

1. [gov.ie - Just Transition Progress Reports (www.gov.ie)](https://www.gov.ie/en/publication/e0e7e-climate-action-plan-to-tackle-climate-breakdown-just-transition/) [↑](#footnote-ref-2)