

Expression of Interest Guidelines

Business Advisory (BA) Approved Supplier List Membership

Program:	Community Housing Futures WA
Administered by:	Shelter WA
EOI Opens:	01/05/2026
EOI Closes:	Ongoing until sufficient numbers are established
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About Shelter WA

Shelter WA is the peak body for community and social housing in Western Australia. We represent and support the community housing sector, advocate for policy reform, and lead programs that build organisational capability across the sector. The Community Housing Sector Capability Program is funded by the Western Australian State Government and is administered by Shelter WA.

Program Overview

The Community Housing Futures WA (CHFVA) Program is a strategic initiative delivered by Shelter WA on behalf of the Department of Housing and Works to strengthen the capability, governance, and growth readiness of community housing organisations across Western Australia. The program supports registered Community Housing Organisations (CHOs) across all tiers, Aboriginal Community Housing Organisations (ACHOs), Aboriginal Community Controlled Organisations (ACCOs), and aspiring and emerging community housing organisations working toward housing service delivery or registration.

The program includes three integrated streams:

- **Growth Readiness Assessments (GRA):** diagnostic assessments to identify capability gaps and readiness
- **Business Advisory (BA) Grants:** targeted funding for organisations to access specialist advisory services
- **Learning and Development:** sector-wide learning and resources

This Expression of Interest establishes the BA Approved Supplier List, a vetted register of professional advisors who are eligible to be engaged by organisations that have been awarded BA Grants.

About the BA Approved Supplier List

The BA Approved Supplier List gives eligible organisations, including registered CHOs across all tiers, registered organisations, ACHOs, ACCOs, and aspiring and emerging community housing organisations, access to a known, pre-qualified pool of advisors.

Important Notice: Inclusion on the BA Approved Supplier List does not constitute an endorsement by Shelter WA or the CHFVA Program of any listed supplier, their services, or their performance. The List is a due diligence register only. The order in which suppliers appear and the number of listings do not imply preference, ranking, or comparative quality. Organisations applying for the grants will be encouraged to conduct their own additional due diligence when selecting an advisor

How It Works

The BA Approved Supplier List operates as a standing register, available to eligible organisations throughout the life of the program. It is not a procurement process: rather, it is a pre-qualification mechanism that gives organisations confidence that the advisors they are selecting have already been assessed against CHFVA Program's baseline standards.

The Approved Supplier List works in the following way:

1. **List establishment:** Advisors apply through this EOI process and are approved for List Membership following assessment and vetting by the CHFVA Program Team.
- **Quality assurance:** All members are vetted for technical capability, sector experience, cultural safety competency, insurance compliance and probity
2. **Grant approval:** Eligible organisations apply for BA Grants through a separate grants process.
3. **Advisor selection:** Organisations identify and contact a member on the list, obtain a quote, and nominate their preferred advisor as part of their grant application.
4. **Direct engagement:** The grantee enters into a contract directly with their chosen advisor and holds full responsibility for managing the relationship, quality of work and payment
5. **Service delivery:** The advisor delivers services to the grantee in accordance with their agreed contract scope and timeline

It is important to note that Shelter WA does not assign, broker or direct individual engagements between grantees and members on the list. The selection decision rests entirely with the grantee organisation. List Membership signals eligibility: it does not guarantee work.

Approved Supplier List Structure and Capability Focus Areas

List members provide specialist advisory services across four core BA Capability Focus Areas. Advisors must apply against one or more focus areas and demonstrate relevant experience and capability in each area nominated. Within these focus areas, the types of advisory services List Members may deliver include:

- **Finance:** Project and business financial modelling, financial risk analysis and key financial ratios
- **Business Planning:** Project and business planning, preparation of business cases, forming partnerships and monitoring results

- **Asset Management:** Developing and implementing strategic asset management frameworks, including asset planning, lifecycle analysis, maintenance programming, portfolio performance monitoring, and the development of Strategic Asset Management Plans (SAMPs). This includes advisory support across both existing housing stock and newly built or procured assets, to support the long-term sustainability of an organisation's housing portfolio.
- **Risk Management:** Understanding, managing, monitoring and mitigating risks across business, financial, policy and governance areas

List Members may also deliver advisory services in the following additional areas, where aligned to an approved BA Grant scope:

- **Partnership Development:** Developing strategic and operational partnerships to support delivery of more housing supply
- **Internal Capability Uplift:** Increasing the internal capability of organisations to deliver growth in social and affordable housing
- **Feasibility:** Assessing the feasibility of proposed housing developments
- **Registration Assistance:** Developing policies, procedures, and business and risk plans required to make an application for state or federal registration.

Eligibility Requirements

Eligibility to join the BA Approved Supplier List is intentionally accessible. The program welcomes applications from a broad range of consultants, advisory firms, and specialist practitioners, including sole traders, small businesses, and larger consultancy organisations, provided they meet the minimum requirements below.

Requirement	Detail
Legal and Business Registration	Valid Australian Business Number (ABN); GST registration if applicable; no undischarged bankruptcy or insolvency proceedings at the time of application
Public Liability Insurance	Coverage appropriate to the Contractor's business size and operating context, sufficient to cover claims arising from the delivery of the Services. Must be current at the time of engagement and maintained for the duration of this agreement.
Professional Indemnity Insurance	Coverage appropriate to the Contractor's professional practice and the nature of the advisory and assessment services being delivered. Must be current at the time of engagement and maintained for the duration of this agreement, including run-off cover where relevant.

Requirement	Detail
WorkCover Insurance	As required by law where employees or subcontractors are engaged
Skills, Experience and Expertise	Demonstrated knowledge and experience in one or more BA Capability Focus Areas, evidenced through qualifications, certifications or equivalent practical experience; a track record in comparable advisory or consultancy services; and familiarity with the operating environment of the housing industry. Formal qualifications are not mandatory where equivalent practical experience can be demonstrated
References	A minimum of two professional references speaking to experience and performance in delivering relevant advisory services
Compliance and Probity	Completion of a Conflict of Interest (COI) declaration prior to appointment; compliance with Australian privacy legislation and program data governance requirements; commitment to confidential and ethical handling of organisational information
Cultural Safety	All applicants are asked to self-declare their cultural safety experience and capability as part of the EOI. This is recorded on the advisor's profile to support informed decision-making by ACHOs. BA is committed to supporting advisors to build this capability over time, and training and resources may be made available throughout the life of the program

Supplier Assessment and Approval Process

All applications for BA Approved Supplier List membership are reviewed by the CHFWA Program Team and assessed on their own merits against the eligibility requirements and capability criteria set out in this guideline. This is not a competitive process: applications are not ranked or scored against one another.

The assessment process involves the following steps:

1. **EOI Submission:** The applicant completes and submits the Membership Application Form, including capability and experience, nominated focus areas, insurance certificates, two professional references, and a Conflict of Interest declaration
2. **Screening Assessment:** The Program Manager reviews the application against the eligibility requirements and assesses demonstrated capability across the nominated focus areas, sector knowledge, and capacity to deliver
3. **Due Diligence Checks:** The Program Team verifies ABN/GST registration, confirms currency of all insurance certificates, and conducts referee checks

4. **Probity Review:** The COI declaration is assessed and recorded. Any restrictions or conditions identified at this stage are noted on the applicant's profile
5. **Approval and Notification:** The Program Manager will assess all applications against the eligibility requirements and approved assessment criteria established by the Steering Committee of the Community Housing Futures WA Program. Applicants are notified in writing of the outcome
6. **Member Agreement:** Successful applicants are issued a Member Agreement for execution prior to their listing being confirmed. The agreement sets out approved focus areas, compliance obligations, and the conditions of List Membership

No work may commence under any BA Grant until the Member Agreement is fully executed. List Membership is reviewed annually, including confirmation of current insurance, an updated COI declaration, and a review of any performance feedback received.

Supplier Profile: Public or Private Listing

Upon approval, all List Members are listed on the BA Approved Supplier List register. Applicants indicate their listing preference as part of the EOI process.

Public Profile: Listed on the Program Website

Suppliers who opt for a public profile will have their details published on the CHFWA program at <http://chfwa.org.au> website, making them visible and accessible to all organisations browsing the List. A public profile includes:

- Business name and trading name
- Contact name, phone and email
- Brief introduction and summary of services offered
- Nominated Capability Focus Areas and types of advisory services delivered
- Business type (sole trader, consultancy firm, etc.)
- Relevant qualifications, experience highlights or sector specialisations
- Cultural safety notation where applicable

A public profile provides the greatest visibility to organisations across Western Australia seeking advisory support through the program.

Private Listing: Register Only

Suppliers who prefer not to be publicly listed may opt for a private listing. Details will be recorded on the internal BA Approved Supplier List register and will not be published on the program website. A private listing does not restrict a supplier's eligibility to work with other organisations in the future. Suppliers may request a transfer to a public profile at any time by notifying the CHFWA Program Team in writing.

Compliance

Approval as a BA Approved Supplier List member carries a set of ongoing obligations. List Members are expected to maintain their eligibility, deliver quality services, and engage professionally throughout the duration of their membership.

Compliance

- Current insurance coverage must be maintained at all times. Lapsed insurance will result in automatic suspension from the List until coverage is reinstated
- Conflict of Interest declarations must be kept current. The CHFWA Program Team must be notified promptly of any change in circumstances that may affect standing or eligibility

Service Delivery

- Services must be delivered to a professional standard in accordance with the scope and contract agreed directly with the grantee organisation
- The grantee must be notified promptly should any issue or delay arise that may affect delivery timelines or outcomes
- Culturally safe engagement practices must be applied when working with ACHOs or Aboriginal-led organisations

Confidentiality and Privacy

- All grantee information must be handled with strict confidentiality and in accordance with Australian privacy legislation
- These obligations continue beyond the conclusion of any individual engagement and for the duration of List Membership

Program Engagement

- List Members are required to participate in program evaluation activities, including client feedback surveys completed upon project closure
- List Members are expected to engage constructively with the CHFWA Program Team should any performance concerns or issues arise during the course of their membership
- The CHFWA Program Team must be notified of any changes to contact details, business structure or eligibility status

Fees and rates are a matter negotiated directly between the member and the grantee organisation and are not required to be reported to Shelter WA.

How to Submit an Expression of Interest

Submission Method

To apply for the BA Approved Supplier List, interested suppliers need to complete the **EOI Application Form** and submit it by email to team@chfwa.org.au with the subject line: **BA Approved Supplier List EOI: [Name / Organisation Name]**.

The application also must include:

- Current Certificate of Currency for Public Liability Insurance
- Current Certificate of Currency for Professional Indemnity Insurance
- A CV or Capability Statement of no more than four pages
- Two professional referee contact details (provided in the application form)
- Optional: de-identified examples of previous advisory work, reports or frameworks relevant to the nominated focus areas

If you have questions about eligibility, the application process or any aspect of this guideline prior to submitting, please contact the CHFVA Program Team:

Email: team@chfwa.org.au

Phone: 0475 409 667

Website: www.communityhousingfutureswa.org.au

Questions about eligibility, service streams, cultural safety requirements or the application process are welcome at any stage.