



Homes
England

Making homes happen

Stage 3 – Invitation to Tender

West Lane, Ripon

Submission Deadline: 30th July 2021

OFFICIAL

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Development of Homes England Land: West Lane, Ripon



Section 1: Introduction

This 'Invitation to Tender' (ITT) represents the final stage of a three stage procurement process being arranged by the Homes England (HE). West Lane site located in Ripon (referred to throughout this ITT as West Lane).

You have received this ITT because you are one of 6 parties from the HE's Delivery Partner Panel 3 (DPP3) NEYH Lot that have been shortlisted to participate in the final tender stage of this procurement process.

Section 2: The Site

A brochure for the site was made available to DPP3 members as part of the initial 'Expression of Interest' stage – which provided key details pertaining to the site.

Site Description

Homes England's interest at West Lane, Ripon comprises approximately 23ha of greenfield land of a roughly rectangular shape located to the south west edge of the cathedral city of Ripon approximately 1.5 miles from the city centre.

Location

Ripon is a cathedral city in the Borough of Harrogate, North Yorkshire located 11 miles south-west of Thirsk and 12 miles north of Harrogate. Ripon has a population of 16,702 (2011 Census). The City Centre forms the main service and employment centre for the extensive rural areas in the northern part of the District. The City's Cathedral, its medieval street pattern and historic buildings make up the City centre with its long standing heritage being historically significant.

Existing Use

The site's most recent use is agricultural although historical map evidence indicates that the site was a former racetrack in 2002. Overhead power cables supported by wooden poles run across the north-western part of the site.

Access

The site has proposed vehicular access via 2 points on West Lane. The points of access have been approved by the LPA and Local Highways Authority and appropriate planning conditions imposed which are to be passed onto the developer.

Planning Overview

The site benefits from Outline planning Permission for 390 homes which was granted on appeal (App Ref No 16/05621/EIMAJ). Reserved Matters for the whole site must be submitted no later than 13th June 2021 otherwise the outline planning permission will expire.

Homes England recognise that it will not be possible to procure a developer partner with enough time to allow that partner to complete a Reserved Matters application on this current timeline. We will therefore preserve the outline permission by submitting a Reserved Matters application and having it validated before the expiry of the outline planning permission on 21st June 2021. This will confirm key fixes and principles including the layout and mix of homes to be provided, with only minor changes required once a developer is appointed. The developer partner will then submit a substitution application to amend house types and tweak the layout.

Planning Conditions

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Planning conditions attached to the outline permission are outlined below as well as Homes England progress with discharging these where appropriate:

Condition no.	Condition wording	Update on progress
1	Prior to the submission of any reserved matters application, a phasing plan covering the whole site shall be submitted to and approved in writing by the Local Planning Authority (LPA). All reserved matters submissions in relation to the development hereby approved shall be in accordance with the approved Phasing Plan.	Discharged (phasing plan can be found in the technical pack issued with the ITT)
2	Application for approval of the reserved matters for the first phase of development shall be made to the LPA not later than 3 years from the date of this permission. The development of that first phase shall begin either before the expiration of 2 years from the date of approval of the last of the reserved matters for the first phase, or before the expiration of 3 years from the date of this permission, whichever is the later.	RMA submitted June 2021
3	Application for approval of reserved matters for all subsequent phases of development shall be made not later than the expiration of 3 years from the date of this permission and the development shall be begun on each subsequent phase of development not later than whichever is the later of the following dates: i) The expiration of 3 years from the date of this permission, ii) The expiration of 3 years from the final approval of the reserved matters for that particular phase or, in the case of approval on different dates, the final approval of the last such matter to be approved.	RMA submitted June 2021 to cover the whole site
4	<p>This permission in terms of access relates solely to the two points of vehicular access with West Lane as shown on Proposed Site Access Arrangement ref: 1395/17 rev G, contained in the Transport Assessment by Ashley Helme Associates Ltd (Ref 1395/5/A) dated April 2017.</p> <p>For each phase of development, no development shall take place on that phase, without the prior written approval of the LPA of the remaining access details and those of the other reserved matters:-</p> <p>a) Appearance,</p>	Details submitted as part of the RMA

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	<p>b) Landscaping - including the planting of trees and or shrubs, specifying types and species, a programme of planting , the width and surface materials of any footpaths and the timing of implementation of the scheme including any earthworks required,</p> <p>c) Layout,</p> <p>d) Scale.</p> <p>Any reserved matters application for appearance, layout or scale shall include details of existing and proposed ground levels and finished floor levels. Such details shall provide for the retention of the existing ground levels unless it is clearly demonstrated that a need exists for change. Thereafter the development shall be carried out in accordance with the approved details.</p>	
5	<p>The proposed development shall be carried out strictly in accordance with the following Drawings: • Location Plan (Drawing No. CSA/3010/118 rev.B) • Parameters Plan (Drawing No. CSA/3010/121 rev.B) • Development Framework Plan (Drawing No. CSA/3010/106 rev.H) • Access Plan (Drawing No. 1395/17 rev.G dated April 2017)</p>	<p>Drawings provided in technical pack issued with the ITT</p>
6	<p>For each phase of development, the site shall be developed with separate systems of drainage for foul and surface water on and off site.</p>	<p>Flood risk and drainage strategy provided in the technical pack issued with the ITT – this covers the whole site</p>
7	<p>For each phase of development, no piped discharge of surface water from the application site shall take place until works to provide a satisfactory outfall, which shall not be the local public sewerage, for surface water have been completed in accordance with details submitted to and approved in writing by the LPA</p>	<p>Flood risk and drainage strategy provided in the technical pack issued with the ITT.</p> <p>There is an Option Agreement in place for an easement over third party land to allow discharge an outfall at the River Skell. This is provided in the technical pack issued with the ITT.</p>
8	<p>For each phase of development, no development, including demolition, shall take place until a site investigation of the nature and extent of contamination for that phase has been carried out in accordance with a methodology which has previously been submitted to and approved in writing by the LPA.</p>	<p>Site Investigation provided in the technical pack issued with the ITT.</p>

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	<p>The results of the site investigation shall be made available to the LPA before any new construction begins. If any contamination is found during the site investigation, a report specifying the measures to be taken to remediate the site to render it suitable for the development hereby permitted shall be submitted to and approved in writing by the LPA. The relevant phase of the site shall be remediated in accordance with the approved measures before new construction begins. If, during the course of development, any contamination is found which has not been identified in the site investigation, additional measures for the remediation of this source of contamination shall be submitted to and approved in writing by the LPA. The remediation of the relevant phase of the site shall incorporate the approved additional measures.</p>	
<p>9</p>	<p>No development for any phase of the development shall take place until a Construction Method Statement for that phase has been submitted to, and approved in writing by, the LPA in consultation with the Highway Authority.</p> <p>The approved Statement shall be adhered to throughout the construction period. The statement shall provide, but not be limited to, the following: a) the location and extent of construction access into the site, b) how the existing public right of way on the site is to be protected and kept clear of any obstruction, c) the erection and maintenance of security hoarding, d) the security arrangements for construction equipment and materials, e) how the site will be cleared, the site developed and dwellings constructed, ensuring there is no encroachment on to the Root Protection Areas of the retained trees, f) the hours of work during the demolition and construction phases restricted to 07:30 to 18:00 Mondays to Fridays 08:00 to 13:00 Saturdays with no work on Sundays or Bank Holidays, g) the parking of vehicles of site operatives and visitors, h) loading and unloading of plant and materials, i) storage of plant and materials used in</p>	<p>Developer to prepare and submit.</p>

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	<p>constructing the development, j) wheel washing facilities, k) measures to control the emission of dust and dirt during construction and demolition, l) heavy goods vehicle routing, m) details of surface water run off control, and n) details of any external lighting</p>	
10	<p>Prior to the commencement of development on any phase of development a geological management plan for that phase shall be submitted to and approved in writing by the LPA.</p> <p>The development shall thereafter be carried out in accordance with the approved management plan. With regard to the geological cliff face in Quarry Moor SSSI, the geological management plan shall include the following:</p> <ul style="list-style-type: none"> • making available any bedrock core logs for future study, • the establishment of a buffer zone between the Whitcliffe Section of the exposed geology within the SSSI and any development, within which contribution vehicles and heavy plant shall not operate. The width of the buffer shall be a minimum of 30m from any part of the Whitcliffe Section, logging of any foundation sections into the underlying bedrock 	<p>Geological Management Plan will be issued in due course.</p>
11	<p>For each phase of development, the reserved matters applications shall include:</p> <p>(1) Detailed engineering drawings to a scale of not less than 1:500 and based upon an accurate survey showing full details of the internal vehicular road network, cycleways and pedestrian footways;</p> <p>(2) Longitudinal sections to a scale of not less than 1:500 horizontal and not less than 1:50 vertical along the centre line of each proposed road showing: (a) the existing ground level, (b) the proposed road channel and centre line levels, (c) full details of surface water drainage proposals;</p> <p>(3) Full highway construction details;</p> <p>(4) Details of all proposed street lighting;</p>	<p>Details submitted with the RMA and included in the technical pack issued with this ITT.</p>

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	<p>(5) Full working drawings for any structures which affect or form part of the highway network;</p> <p>(6) A programme for completing the works.</p> <p>The development shall only be carried out in full compliance with the approved drawings and details. No dwelling shall be occupied until the carriageway and any footpath/footway from which it gains access is constructed to basecourse macadam level and/or block paved and kerbed and connected to the existing highway network with street lighting installed and in operation. The completion of all road works, including any phasing, shall be in accordance with a programme approved in writing with the LPA before the first dwelling of the development is occupied</p>	
12	<p>There shall be no access or egress by any vehicles between the highway and the application site (except for the purposes of constructing the initial site access) until splays are provided giving clear visibility of 36m in a westerly direction and 43m in an easterly direction measured along both channel lines of the major road (West Lane) from a point measured 2.4m down the centre line of the access road. The eye height will be 1.05m and the object height shall be 0.6m. Once created, these visibility areas shall be maintained clear of any obstruction and retained for their intended purpose at all times</p>	<p>Details submitted with the RMA and included in the technical pack issued with this ITT.</p>
13	<p>No development on any phase of the development shall take place, except for investigative works, until a scheme for the following off site highway works, including timings for implementation of the works, has been submitted to and approved in writing by the LPA:</p> <ul style="list-style-type: none"> (i) Provision of dropped kerbs and/or tactile paving on West Lane, South Grange Road, and Whitcliffe Lane; (ii) Removal and re-alignment of the existing drop kerb crossing and the provision of tactile paving on Hell 	<p>Details submitted with the RMA and included in the technical pack issued with this ITT.</p> <p>Timings for implementation of the works to be agreed with the LPA by the developer.</p>

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	<p>Wath Grove to serve the sports pitches;</p> <p>(iii) Provision of footways on the southern side of West Lane;</p> <p>(iv) Realignment of West Lane and the junctions of South Grange Road and Southfield Road. The off site works shall be carried out in full accordance with the approved details.</p>	
14	<p>No dwelling shall be occupied on any phase until a scheme for the provision of electric vehicle charging points for that phase, either provided individually or communally, including timescales for implementation, has been submitted to and approved in writing by the LPA. The approved scheme shall thereafter be provided in accordance with the agreed timetable and shall be retained for the lifetime of the development</p>	<p>FLOH Consulting Ltd have produced an Electric Vehicle Charging Strategy which will be submitted with the Reserved Matters Application.</p> <p>The document can be found in the technical pack issued with the ITT.</p>
15	<p>No development for any phase of the development shall take place until a Construction & Environmental Management Plan (CEMP) shall be agreed in writing by the LPA prior to the submission of a reserved matters or full planning application. The CEMP shall address issues including minimisation of impacts on Quarry Moor SSSI and Hell Wath LNR, the minimisation of impacts of air and water pollution on ecological receptors, impacts on retained trees and hedgerows; impacts on species including bats, great crested newts, nesting birds, hedgehogs and (if necessary) eradication of invasive species. No removal of trees, hedgerows or scrub shall be undertaken before the CEMP has been agreed in writing with the LPA. The CEMP shall be implemented in full accordance with the approved details</p>	<p>The CEMP has been agreed and the decision notice relating to discharge of this condition can be found in the technical pack issued with the ITT.</p> <p>The 'outline' nature of the document has been reflected in the informative, which states "Should the CEMP be subject to significant changes, the final CEMP must be agreed in writing with the local planning authority prior to the implementation of each phase."</p>
16	<p>No development for any phase of the development shall take place until an Ecological Management and Enhancement Plan (EMEP) for that phase of development has been agreed in writing by the LPA.</p> <p>The EMEP shall be based upon the mitigation and enhancement measures identified in the Ecology chapter of the ES submitted with the</p>	<p>Updated ecological assessment has been submitted as part of the RMA and is provided in the technical pack issued with this ITT.</p> <p>The document includes information pertaining to the EMEP and includes mitigation and enhancement measures</p>

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	<p>planning application. The EMEP shall be implemented in full accordance with the approved details</p>	<p>that were identified in the ecology chapter of the approved Ecology Statement.</p> <p>The developer will produce the EMEP.</p>
17	<p>The proposed development shall be carried out strictly in accordance with the following drawings, unless an updated Tree Survey, which has been submitted to and approved in writing by the LPA, confirms that additional trees are unfit for retention:</p> <ul style="list-style-type: none"> • Tree retention plans: drawing nos. 6197-A-03 rev.A (north) and 6197-A-03.01 rev.A (south) • Tree retention access plan: drawing nos. 6197-A-04 <p>Should an updated Tree Survey include updated versions of the above plans, then the development shall be carried out strictly in accordance with the updated versions of those plans</p>	<p>An updated Tree Survey has been submitted as part of the RMA and can be found in the technical pack issued with the ITT.</p>
18	<p>No dwelling on the site shall be occupied until such time as the approved car parking spaces associated with that dwelling have been provided in full accordance with the approved details. The car parking spaces, including garages, shall be retained for that purpose</p>	<p>Pre-occupation condition – developer to discharge.</p>
19	<p>Prior to the occupation of any dwelling of the site, a master Travel Plan for the entire site, irrespective of phasing, shall be submitted to and approved in writing by the LPA. All subsequent Travel Plans for each phase of development shall be prepared in full accordance with the master travel plan. Prior to the occupation of any dwelling in each phase, a travel plan shall be submitted to and approved in writing by the LPA to include measurable time related targets to encourage the use of alternative modes of transport other than the private car by residents of the site and visitors to their dwellings and proposals for regular review and update. The Travel Plans shall be implemented and the development shall thereafter be carried out and operated in accordance with the Travel Plans.</p>	<p>Pre-occupation condition – developer to discharge.</p>

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A detailed overview of public and stakeholder engagement has been included in the Statement of Community Involvement submitted with the Reserved Matters Application and provided in the technical pack.

In the context of the current Covid-19 pandemic and related social restrictions, a programme of online public events took place utilising the PlaceChangers platform which is a bespoke series of web pages dedicated to the West Lane development. The feedback from the local community has influenced the Reserved Matters Application's design proposals and the design team have fed back to specific comments and suggestions via the PlaceChangers platform. The PlaceChangers platform can be accessed via this link <https://app.placechangers.co.uk/site/198/page>

The design team will continue to speak with stakeholders through the determination period and will continue to update the public as the developer is appointed. Further public engagement will be necessary as final details are fixed.

Affordable Housing and Housing Mix

Based on market feedback and the HEDNA mix and the pre-application discussion with Harrogate Borough Council, Homes England is proposing the following mix:

Open Market Sale

House Type	No.
1 bed house	0
2 bed bungalow	22
2 bed house	48
3 bed house	105
4 bed house	59
Total	234 (60%)

Affordable Housing

House Type	No.
1 bed house	29
1 bed accessible bungalow	2
2 bed bungalow	18
2 bed house	44
3 bed house	47
4 bed house	16
Total	156 (40% of 390)

£106 Affordable Housing: Harrogate Council operate a strict £106 affordable housing transfer policy to ensure fair competition and control over delivery. All £106 affordable housing must transfer to an RP at a fixed value of £1100 per square metre for houses, £1050 per square metre for flats) irrespective of affordable

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tenure. There is also an agreed specification which sets out what will be included in that price for a standard dwelling – anything over and above can be agreed between developer and RP as extras.

The Council sit on a developer panel with 16 partner housing associations (and the two councils) for s106 sites. Part of the role of the Partnership is to match s106 opportunities to individual RPs. All partners are asked for expressions of interest in all s106 sites and each site is matched to an RP by one of three Matching Panels, each Panel comprising 5/6 housing associations as well as the local authority. The panel will consider any reasons given by partners wishing to take the affordable homes on that site (including relationships with the developer) and will try to accommodate preferences whilst seeking to ensure an even spread of opportunity. It is the Panel that nominates an RP for the site. This policy will not apply to a JV between a developer and an RP subject to Harrogate Council’s satisfaction that appropriate management arrangements were in place (either through the Council or an RP with stock locally) as well as nomination agreements. Currently Harrogate Council have 100% nomination rights to first lets and an average of 75% to everything thereafter.

Compliance with this policy is a pass / fail criteria in this tender.

If affordable homes are transferred at golden brick stage Homes England reserve the right to amend the payment schedule to ensure payment is made to reflect any transfer.

Accessible Housing: Harrogate Council have confirmed that under Policy HS2 Affordable Housing they require 2 of the affordable dwellings to be wheelchair accessible dwellings that meet M4(4)(2)(b) standards. As above these are 1 bed accessible bungalows in Homes England’s proposed layout.

Space Standards: All homes are required to be built to Nationally Described Space Standards (NDDSS).

Unilateral Undertaking for the outline planning permission

A Unilateral Undertaking was signed on 3 November 2017 by Gladman Developments Ltd as site promoter and the then owners of the site, collectively known as Zetland Estates. The UU includes various contributions to HBC and NYCC and provides trigger points for payment of contributions along with requirements for submission of documents for approval, the implementation of the scheme and procedure for agreeing the transfer of any open space/ SuDS/ boundary landscaping to HBC. These are summarised in the table below:

Obligation	Description	Contribution (figures to be indexed from date U.U. signed)
Housing		
Affordable Housing	Submit an Affordable Housing Scheme to the Council	Up to 40%
Education		
Secondary schooling	Contribution towards expansion of capacity at Ripon Grammar School	£514,427.55
Primary schooling	Contribution towards expansion of capacity at Ripon Cathedral CoE School	£377,289.00

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Junior Schooling	Contribution towards expansion of capacity at Moorside Junior School	£229,189.71
Open Space / Recreation		
Onsite open space / open space works specification and management plan	Submit an Open Space Works Specification and Management plan prior to commencement of development and agree management / maintenance arrangements with Council	On-site informal open space and landscaping provision +2 LEAPS
Off-site open space	Contribution towards off-site open space enhancement for outdoor sports facilities at Hell Wath	£142,678.92
Public rights of way	Contribution towards improving the public right of way network in the vicinity of the site	£20,000.00
Nature Reserves	Contribution towards additional dog waste and litter bins, new interpretation/signage and new fencing/barriers in Quarry Moor and Hell Wath Local Nature Reserves	£20,000.00
Boundary Landscaping Land Specification	Submit a Boundary Landscaping Land Specification prior to commencement of development, and agree management/maintenance arrangements with Council	N/A
Boundary Landscaping maintenance	Contribution towards maintain the approved Boundary Landscaping, if transferred to the Council	£27,000.96
Highways		
Improved bus services	Contribution towards extension and increased frequency of bus services in the vicinity of the site	£455,000.00
Cycling	Contribution towards improvements that may include 1) cycle lane on Whitcliffe Lane and Harrogate Road and / or 2) upgrade of existing footpath through Quarry Moor to a shared use path to connect with Morrisons and Greystone Community Primary School and / or 3) upgrade and improvement of bridleway between Hell Wath	£50,000.00

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	Lane and Studley Road to provide all-weather surface	
Traffic signalling	Contribution to junction at Low Skellgate/Somerset Row/High Skellgate (town centre) and junction at High Skellgate/Westgate and Market Place (town centre)	£91,000.00
Travel Plan	Contribution towards monitoring performance of the travel plan	£5,000.00
Environmental		
Air quality	Contribution to mitigate NOx and PM10	£225,550.14
Drainage/SuDS scheme	Submit a SuDS Scheme for approval and agree management/maintenance arrangements with Council. Implement in accordance.	SuDS scheme

Of note is the obligation regarding the Green Land. This area of land has not been transferred to Homes England as it remains in Zetland Estates ownership to access their retained land. The implications of this point will need to be considered by bidders. The plan of the Green Land attached to the UU is unclear, but a better version is included within the technical pack issued with this ITT.

Bidders should ensure that all of the contributions listed above are clearly identified in the Bid Summary and Tender Form 2 (Cost Summary) as well as any development appraisal submitted with their bid.

Phasing

Planning condition no. 1 (phasing plan) has already been discharged as per the plan below. The phasing plan firmly established the phase 1 and phase 2 development areas and although the quantum of development is not tied down within each phase indicatively the split is 250 units for phase 1 and 140 units for phase. Both Condition 2 and 3 require RMA by 13th June 2021 and this timeline can not be altered (this has been raised with HBC officers). Therefore, Homes England is submitting a reserved matters application for the whole site.

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Homes England is therefore seeking a developer partner for the whole site. The developer partner will be expected to deliver the site in a sequential approach starting from the approved phase 1 as well as undertaking the wider infrastructure required for the whole site.

Section 3: Existing Site Information

Sustainability

FLOH Consulting Ltd have prepared an energy statement to support the Reserved Matters Application which considers energy and carbon performance of the development and how it can meet relevant policy requirements.

FLOH Consulting Ltd have also produced an Electric Vehicle Charging Strategy to calculate the load assessment which has been undertaken to inform utilities procurement. Allowance has been made for slow/trickle charging at 3.6kW AC for 80% of dwellings. Allowance for fast charging at 7kW has been made for the remaining 20% of dwellings.

Developers are required to provide the necessary infrastructure to properties to facilitate electric vehicle charging but it is not a specific requirement to provide charging equipment on each property.

Developers are required to provide a fibre connection to the premises (not just to the site). We are aware that Fibre Nation are currently rolling out fibre connection to the premises in Harrogate, Knaresborough and Ripon and contact details can be provided on request.

Developers should ensure all costs associated with the proposed sustainability measures are clearly identified in the Bid Summary and Tender Form 2 (Cost Summary) as well as any development appraisal submitted with their bid.

Flood Risk Assessment and Drainage Strategy

Surface water drainage is dealt with by way of an outfall to the nearby River Skell situated approximately 375m to the north of the site. The outfall sewer from the site to the River Skell will need to cross third party land not owned by Homes England. To facilitate this, an option agreement for an Easement has been secured with the third party landowners for the construction of the proposed sewer. At outline planning, a connection into the river was agreed in principle by the Lead Local Flood Authority.

The Option can be exercised at any time after the grant of (detailed) Planning Permission during the Option Period which runs to 21 December 2023. It will be a condition precedent in the Agreement for Lease that Homes England will complete the deed of easement. On completion of the Deed of Easement, the Easement Price of £100k will be due to the landowner and it is expected that this cost will be met by the developer. The developer will also be expected to meet the landowner's costs in granting the easement.

Copies of the Option Agreement and Supplemental Agreements are provided in the technical pack issued with this ITT.

The Deed of Easement will be substantially in the same form annexed to the Option Agreement subject to any reasonably required amendments.

Bidders should provide details of any amendments required along with their submission.

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The surface water drainage strategy proposes to attenuate runoff within four SuDS basins, prior to discharge into the River Skell. Two of the basins are to be online dry detention basins and one is to have shallow standing water to encourage wetland habitats. These 3 basins have been designed to attenuate flows up to the 1 in 100 year plus 40% climate change event. The fourth basin is to be offline containing 1m of permanent standing water. Only flows from the 1 in 100 year plus climate change event will be stored within the basin above the permanent standing water level.

The drainage strategy also aims to incorporate permeable paving within shared driveways and conveyance swales adjacent to the highway to increase the storage potential with the site and aid with the removal of potential contaminants contained within the runoff.

The drainage infrastructure and the online basins are to be put forward for adoption to Yorkshire Water for future maintenance, whereas the offline basin is to be privately maintained as it falls within the ecology conservation area and will fall within the management and maintenance strategy for that part of the site.

Foul water flows from the proposed development are to be discharged into the public combined sewer on West Lane. A pre-development enquiry response from Yorkshire Water confirmed a connection can be made to this sewer at Manhole 4601.

Highways

Access will be via 2 points from West Lane as shown on the Proposed Site Access Arrangement contained in the Transport Assessment by Ashley Helme Associates contained in the technical pack issued with the ITT.

The highways authority has agreed the Transport Assessment by Ashley Helme Associates, it's base data and the measures to assist sustainable travel. Condition 19 confirms that prior to the occupation for any swelling of the site, a master Travel Plan for the entire site shall be submitted to and approved in writing by the LPA. This should include measurable tie related targets to encourage the use of alternative modes of transport other than the private car by residents of the site and visitors to their dwellings and proposals for regular review and update. The developer is expected to agree the Travel Plan with the LPA to discharge condition 19.

Condition 13 relates to offsite highways works. A scheme of works has been submitted with the RMA and is provided as part of the technical pack issued with the ITT. Timings of the works are to be agreed by the developer prior to RMA determination.

Developers should ensure all costs associated with the proposed highway works are clearly identified in the Bid Summary and Tender Form 2 (Cost Summary) as well as any development appraisal submitted with their bid.

Trees

An Arboricultural method statement has been prepared by TEP as part of the RMA and is provided as part of the technical pack issued with this ITT. It includes up to date tree retention plans and RMA approval will satisfy the written approval requirement of condition 17 of the outline permission. The document comprises

4 separate method statement sheets collectively detailing the physical and procedural protection required to ensure the long term survival of retained trees and hedgerow.

Developers should ensure all costs associated with compliance with this statement are clearly identified in the Bid Summary and Tender Form 2 (Cost Summary) as well as any development appraisal submitted with their bid.

Ecology and Biodiversity

An updated ecological assessment has been prepared by TEP as part of the RMA and is provided as part of the technical pack issued with this ITT. This document does not seek to discharge condition 16, but includes information pertaining to this, and includes mitigation and enhancement measures that were identified in the ecology chapter of the approved Ecology Statement.

TEP determined the following updates were required to support the Reserved Matters Application:

- Walkover survey of the site to determine condition changes
- Aerial assessment of trees for their potential to support roosting bats
- Dusk emergence/dawn re-entry survey of trees for bats
- Review of approach to Great Crested Newts at the site

The report also provides information on ecological constraints which will need to be taken into account during the development of the site.

Great Crested Newts: no updated survey has been undertaken with regard to GCN, instead the District Level Licencing (DLL) approach for great crested newts has been agreed in relation to this site. An enquiry form has been submitted and Homes England is in the process of signing the Impact Assessment and Conservation Payment Certificate (IACPC) included in the technical pack and issued with this ITT.

Once planning permission is granted, the developer will make a license application to Natural England and the Conservation Payment will be due. This cost is expected to be met by the developer.

The report includes other recommendations to avoid or where this is not possible, mitigate for any adverse impact on wildlife in relation to the development of the site. Opportunities for appropriate enhancement are also set out.

Bidders should ensure all recommendations are included within their proposals and the costs for delivering the recommendations are clearly identified in the Bid Summary and Tender Form 2 (Cost Summary) as well as any development appraisal submitted with their bid.

Heritage

A full Heritage Assessment, including extensive analysis of the existing site and surrounding heritage assets and the likely impact of the development was completed for the outline application. The Planning Statement accompanying the Reserved Matters Application and issued as part of the technical pack with this ITT explains the full detail of the site's planning history in respect of the previous refusal relating to

heritage which was later overturned on appeal with outline planning permission subsequently granted by the Secretary of State.

The Design and Access Statement includes an assessment of the measures to be taken to mitigate the impact on heritage assets and to address concerns raised by the National trust regarding views from the site over key heritage assets.

Utilities

A utilities infrastructure strategy has been prepared by FLOH Consulting and is included with the technical pack. The document includes:

- A comprehensive load assessment to ascertain likely gas, water and electricity demands of development
- Capacity assessment and details of any necessary enforcement
- Identifies key strategic routes and approximate connection points to development plots
- Identifies diversions of existing utilities and proposed routes for diverted services

Electricity:

There is an 11kv overhead cable route bisecting the northern section of the site from the western boundary to the northern boundary. This overhead cable route was granted permission under an agreement dated 7th August 1958. This agreement contained provisions for the removal of the cables, at the statutory utility provider's cost, subject to prior agreement and notice. Notice was served on Northern Powergrid for the relocation of the cables by the previous landowner and this has been formalised through a Notice to Terminate which was served on NPG on 27 October 2018.

The exact route of the diversion has yet to be finalised, however, the proposed route runs within the landscape buffer around the western and northern site boundaries reconnecting to existing by Whitcliffe Lane within the site. A new easement will be required and there will be associated rights of vehicular and non-vehicular access together with restrictions on the planning of trees and shrubs and this has been taken into account during the detailed design of the buffer zone.

Homes England completing the deed of easement with Northern Powergrid will be a condition in the Agreement for Lease.

Landscaping

The landscape proposals for the residential development will play an important role in creating a pleasant and attractive place to live that has a distinct identity building on the site's heritage and incorporating a green space network that will also benefit neighbouring communities.

The landscape masterplan includes a series of interconnected landscape corridors and open spaces which have a number of functions and provide formal and informal open space. 2 play areas are proposed within the RM application and these must comply with Harrogate Council's Children's Playground Specification for LEAP Playgrounds which is included in the technical pack issued with the ITT.

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The open space surrounding the development will also enhance the ecological conditions of the site, particularly along West Lane, where the existing hedgerow will be retained/translocated where possible, and enhanced with new planting and hedgerows to encourage wildlife movement. An ecological buffer to the south east of the site has been created to mitigate effects on the Quarry Moor Local Nature Reserve.

Details can be found in the Landscape Statement and associated drawings included in the technical pack and issued with this ITT.



Ground Conditions (Site Investigations)

The outline application was supported by a Ground Conditions Desk Study (RSK Environment Ltd dated November 2016) and subsequently an initial phase 2 ground investigation was undertaken by RSK Environment Ltd in September 2018. Additional investigations were required to provide more comprehensive gas monitoring and contamination and geotechnical testing across the site. A summary of the factual information currently available is provided in a Summary of Preliminary Findings of Ground Investigation document prepared by Tibbalds Campbell Reith and included in the technical pack issued with this ITT. A full interpretative report will be provided in due course.

Technical Pack

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A technical pack is provided with this ITT containing the reports listed below. The reports are up to date at the date of tender issue but developers should satisfy themselves that they are reviewing the most recent and current versions and that their tender is based on the most up to date reports.

The reports are being provided with reliance unless expressly stated otherwise. Bidders must fully review the information supplied in the technical pack and on the planning portal for the purpose of developing their proposals and finalising their tender. Summary of known information is provided below.

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	Info	In place/Date of Report	Comments
Site / Planning Info			
1	Site Red Line Boundary Plan	2021 01 26	Plan 50314_001
2	Illustrative Masterplan Layout and housetypes	2019 04 2016 12 2017 05 09 2016 07 2021 06 08	Phasing Plan (approved) Location plan CSA/3010/118 rev B (approved) Parameters Plan CSA/3010/121 rev B (approved) Dev. Framework Plan CSA/3010/106 rev H (approved) <i>Refer to separate zip folder JDDK plans</i>
3	Planning Policy Guidance Planning statement Policy Matrix	2020 2021 06 08 2021 06 08	<i>HBC play standard equipment</i> <i>Tibbalds Planning Statement</i> <i>Tibbalds Policy Matrix</i>
4	Design Access Statement	2021 06 08	<i>JDDK – DAS & Heritage statement</i>
5	Public Consultation Statement	2021 06 08	<i>Tibbalds – Statement of Community Invovlement</i>
6	Completed S106 Agreement	2017 11 03	UU S106 Gladman Developments
7	Decision Notice	2018 06 25 2017 07 25	Final decision notice Planning Committee Report
8	Planning Guide & Conditions Tracker	NA	N/A
Technical Studies			
9	Phase 1 desktop	2016 11 30	Hydrock (Letter of Reliance provided)

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	Phase 2 Intrusive Site Investigations	2018 09 28	Geo-Env Report - RSK Environmental (Letter of Reliance provided)
	Gas Monitoring Survey Findings	2018 12 21	Ground Gas report – RSK Environmental (Letter of Reliance Provided)
	Remediation strategy	N/A	
	Foundation strategy		Foundation strategy in RSK report.
		26/4/2021 – 06/05/2021 2021 06 08	<i>Bore hole log sheets</i>
		2021 06 08	<i>Campbell Reith Summary of Preliminary Ground investigations</i>
			<i>Campbell Reith Bore hole locations</i>
10	Asbestos register or pre-demo survey (Occupied buildings should have a register disused to be surveyed and structural survey)	N/A	
11	Flood Risk Assessment	2017 04 30 2021 06 08 2021 04 27-28 2021 06 08 2021 05 04	Enzygo (Letter of reliance provided) <i>Campbell Reith Flood Risk and Drainage Strategy (part 1)</i> <i>Campbell Reith Borehole log FRA (part 2)</i> <i>Campbell Reith SuDs Basins B-D & SW Outfall FRA (part 3)</i> <i>Campbell Reith Basin A</i>
12	Surface Water Drainage Strategy – detailing storage requirements, run off rates, soakaway test results and details of local drainage solutions (i.e. existing water courses, CCTV)	2015 07 08 2016 12 2021 05 04 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08	Enzygo (Letter of Reliance provided) ES Chapter 14 Drainage <i>Campbell Reith SW Catchment plan</i> <i>Campbell Reith Drainage longsection 5500</i> <i>Campbell Reith Drainage longsection 5501</i> <i>Campbell Reith Drainage longsection 5502</i> <i>Campbell Reith Drainage longsection 5503</i> <i>Campbell Reith Drainage longsection 5504</i> <i>Campbell Reith Drainage longsection 5505</i> <i>Campbell Reith Drainage longsection 5506</i> <i>Campbell Reith Drainage longsection 5507</i> <i>Campbell Reith Drainage longsection 5508</i>

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		2021 06 08 2021 06 08 2021 06 08 2021 06 08	<i>Campbell Reith Drainage longsection 5509</i> <i>Campbell Reith Drainage longsection 5050</i> <i>Campbell Reith Drainage longsection 5051</i> <i>Campbell Reith Drainage longsection 5052</i>
13	Foul Water Drainage Strategy – detailing invert levels and connection points into the local sewer system	2016 11	Utility Law Solutions
14	Topographical survey in CAD format (covering drainage, building floor levels, boundaries, elevations)	2014 08 07	JLP Surveying (PDF x 3, dwg. X2) (Letter of Reliance provided)
15	Ecology Survey / Arboricultural Survey (Birds, Bats, Badgers, Newts, Flora & Fauna, Invasive weeds)	2018 09 25 2016 11 11 2016 12 2021 05 27 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08 2021 06 08	Tree Retention Plan 6197-A-03 rev A north (approved) Tree Retention Plan 6197-A-01 rev A south (approved) Tree retention access plan 6197-A-04 (approved) FPCR (Letter of Reliance provided) Soil resources & quality (Letter of Reliance provided) ES Chapter 7 Ecology <i>TEP – Landscape Masterplan</i> <i>TEP – Landscape statement (part 1)</i> <i>TEP – Landscape statement (part 2)</i> <i>TEP – South West LEAP</i> <i>TEP – North West LEAP</i> <i>TEP – Ecological assessment</i> <i>TEP – Biodiversity Pro-Forma</i> <i>TEP – Tree constraints plan</i> <i>TEP – Arboricultural method statement</i>
16	Air Quality Survey (Contaminants, malodourous)	2017 08	Wardell Armstrong (Letter of Reliance provided)
17	Highways / Transport Assessment (traffic generation, permitted uses, predicted generation and access/ransom)	2017 04 2017 04 2017 04	Access plan 1395/17 rev G (approved) Ashley Helme - Transport Assessment Ashley Helme - Travel Plan (Letter of Reliance provided)
18	Utilities Surveys – (up to date service records of gas, water, electricity and telecoms / capacity assessment)	Undated 2018 06 19 2019 05 09	Utilities Statement BT New Sites Registration BTS Overhead cable diversion report

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		2014 02 10 2014 02 11 1996 08 07 2014 02 11 2017 03 21 2017 05 31 2017 04 12 2021 03 24	BT drawings (x5) Electricity drawings (x 6) Electricity drawings (x 3) NPG connection quote NPG Letter Gas drawing – Murphy Gas connection quote <i>Draft overhead cable diversion route</i>
19	Energy strategy (renewables, PV/Solar/CHP/ground source/gas)	2021 06 07 2021 06 07 2021 06 07 2021 06 07	<i>FLOH – Energy Statement</i> <i>FLOH – Utilities Infrastructure Strategy</i> <i>FLOH – Electric Charging Strategy</i> <i>FLOH – Sustainability Statement</i>
20	Noise & Vibration Impact Assessment	2016 12 06	Enzygo report (Letter of Reliance provided)
21	Environmental Impact Assessment (if required)	2017 05	Environmental Statement - Addendum
22	Constraints Plan		To follow
23	Foundation Zoning Plan	2019 09 28	Geo-Env Report - RSK Environmental (Letter of Reliance provided)
24	Building Surveys & CAD Layout Plans (if applicable)	N/A	
25	Rights of light (check title for positive covenants and restrictive covenants)	N/A	
26	Details of the specification of proposed access infrastructure works Delivery strategy	2021 06 08	<i>Campbell Reith Junction & Forward Visibility 6190</i> <i>Campbell Reith Junction & Forward Visibility 6191</i> <i>Campbell Reith Junction & Forward Visibility 6192</i> <i>Campbell Reith Highway Longsections 6550</i> <i>Campbell Reith Highway Longsections 6551</i> <i>Campbell Reith Highway Longsections 6552</i> <i>Campbell Reith Highway Longsections 6553</i> <i>Campbell Reith Highway Longsections 6554</i> <i>Campbell Reith Highway Longsections 6555</i> <i>Campbell Reith Highway contour layout 6400</i> <i>Campbell Reith Highway contour layout 6401</i>

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			<p><i>Campbell Reith Highway contour layout 6402</i> <i>Campbell Reith Highway Road markings 6100</i> <i>Campbell Reith Highway Road markings 6101</i> <i>Campbell Reith Highway Road markings 6102</i> <i>Campbell Reith Highway Pavements & footways 6000</i> <i>Campbell Reith Highway Pavements & footways 6001</i> <i>Campbell Reith Highway Pavements & footways 6002</i> <i>Campbell Reith Highway Horizontal alignment 6050</i> <i>Campbell Reith Highway Adoption plan 6200</i> <i>Campbell Reith Highway Adoption plan 6201</i></p> <p><i>Campbell Reith Highway Site clearance 6300</i> <i>Campbell Reith Highway Site clearance 6301</i></p> <p><i>Campbell Reith Highway Traffic signs 6100</i> <i>Campbell Reith Highway Traffic signs 6101</i> <i>Campbell Reith Highway General arrangement 4250</i> <i>Campbell Reith Highway General arrangement 4251</i></p> <p><i>Campbell Reith Highway Junction visibility 4260</i> <i>Campbell Reith Highway Junction visibility 4261</i></p>
27	Archaeology and historic maps	2016 12	Archaeology ES Chapter - CgMs consulting
28	UXO	N/A	N/A
Legal			
29	Drainage Easement Option	Issued in Legal Pack	<p><i>Barclays Consent to Easement Option</i> <i>Easement Option (2nd Supplemental)</i> <i>Easement Option (Supplemental Agreement)</i> <i>Easement Option dated 22.12.16</i> <i>NatWest Consent to Easement Option</i> <i>Official Copy (Register and Title Plan)</i> <i>Official Copy (Register) – NYK441753</i> <i>Official Copy (Title Plan) – NYK44175</i></p>
30	Electricity Cable Diversion	Issued in Legal Pack	<p><i>Electricity cable diversion report_THL</i> <i>Electricity Wayleave Agreement dated 7.8.1958</i></p>

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			<i>Wayleaves Remittance</i>
31	Homes England Title to the land	Issued in Legal Pack	<i>Defective Title and Chancel Liability Homes England LR application details Homes England LR application submission NYK323479 – TP1 dated 5.2.21 (purchaser counterpart) NYK323479 – TPI dated 5.2.21 (vendor original) Official Copy (Register) - NYK3232479 Official Copy (Title Plan) – NYK323479 Official Copy (Transfer) 12.06.2006 – NYK323479 RX4 – NYK323479</i>
32	Planning	Issued in Legal Pack	<i>Outline planning permission dated 13.6.18 Section 106 Unilateral Undertaking dated 3.11.17</i>
33	Search Results	Issued in Legal Pack	<i>Argyll Site Solutions Combined Chancel Check (2020) Drainage and Water Search (2014) Highways Search (2020) Local Authority Search (2020) SIM Result (2021)</i>
34	Transactional Documents	Issued in Legal Pack	<i>Heads of Terms Agreement for Lease Building Lease</i>

Section 4: Homes England Objectives

Homes England's objectives from this disposal exercise are as follows:

- To receive offers for the site which are conditioned on reserved matters approval only
- To exchange contracts on an Agreement to Lease with its selected development partner by 20th November 2021 and for its selected development partner to secure a reserved matters consent for its tendered scheme and start on site with the development in summer 2023.
- To secure scheme proposals that balance high standards of design with the best land value offer achievable
- For its selected development partner to build out its consented scheme in the shortest timeframe possible (and which, in any event, cannot exceed 60 months.
- For its selected development partner to build out the scheme using a variety of Modern Methods of Construction (MMC) techniques (and which, in any event, cannot fall below the minimum MMC threshold of 2.5 set for this project)
- For all dwellings delivered across the scheme to be sold freehold and therefore free from any ground rent arrangements (with the exception of apartment dwellings)

Section 5: Design Guidance

In addition to those objectives outlined above, Homes England wants bidders to demonstrate high standards of design quality across their tendered schemes.

Homes England's preferred method of measuring good design is based upon the Building for a Healthy Life toolkit (or its successor). The following narrative is provided as a source of guidance for bidders regarding the Building for a Healthy Life related design principles and influences that the Agency would like to see incorporated into bidder proposals.

Creating Attractive & Resilient Places

Tendered schemes should adopt an inclusive and sustainable vision which demonstrates how they will meet local housing need and contribute to the character and quality of the local area.

The scheme should be locally or otherwise distinctive and be developed at the appropriate scale to include active frontages onto streets and open spaces in order to create a positive and animated public realm.

Proposals should accord with any parameter plans and account for conditions attached to the extant planning approval for this site. The planning decision notice is provided in the Technical Pack accompanying this tender.

The scheme should include appropriate placement of potential infrastructure, such as pumping stations, sub-stations and sales outlets, in order to complement the overall design layout.

Character

Tendered proposals should aim to create places which strike a balance between being distinctive yet draw on the character of their surroundings.

The scale and design of proposed buildings should be approached in a balanced, holistic way, ensuring that the visual impact of the development enhances its context and surroundings. The development should seek to integrate built form and townscape characteristics drawn from the local area.

Accommodation mix and tenure mix

Proposals should incorporate an appropriate range of different housing types, with a majority in response to identified housing need.

The use of standardised house designs and elevations is acceptable. However, Homes England welcomes the re-elevation of standard house designs and the use of feature house types, taking cues from the general layout and architectural styles of properties in the surrounding area.

Access

Proposals should show vehicular accesses into the site in accordance with the outline planning consent, with any proposed pedestrian / cycle connections being clearly marked as part of your layout proposals.

Street and Parking

Your scheme should show access routes through the development which should permit legible pedestrian and cycle movement, as well as vehicular, and aim to create a clear street hierarchy to guide all road users. The internal road network should be designed to adoptable standards without compromising a high-quality layout.

Parking provision should be delivered in a variety of configurations, which are always sensitive to the needs and convenience of residents.

Density

Consideration should be given to suitable housing densities, mindful of site coverage, but appropriate to the site context. Density should be the product of a design, not the driver.

Promoting sustainable lifestyles

Creating a sustainable and inclusive development is a fundamental part of what Homes England wants to achieve across the site. Through improved pedestrian and cycle connections and paths, we want to encourage alternative, sustainable modes of movement and reduce car dependency for local journeys.

Green/ blue infrastructure and biodiversity

Tendered proposals should seek to maintain or enhance the framework of open spaces across the site by retaining natural features of value wherever possible.

The placemaking approach applied in your scheme should seek to embed a sense of connectivity with the surrounding landscape and create open space that combines uses and has the potential to bring communities together and boost health and well-being.

Landscaping design approaches should detail the ways in which spaces can be used whilst being sensitive to the potential presence of protected species on site and in the surrounding areas.

Purpose of Open Space / Play Space and its Management

Consideration should be given to the purposefulness of the open space and play spaces, together with its long-term management. Every element of open space should aim to contribute positively to the scheme. Successful open spaces frequently combine more than one use and are multi-purpose.

Your proposals should seek to design out all forms of incidental open space – which are often poorly maintained and can become unsightly. There should also be good delineation between the curtilages of properties and open spaces/ public realm in order that there is clarity over who should be responsible for managing all spaces within the development.

Biodiversity

Where possible, schemes should aim to enhance biodiversity through new habitat creation – which will serve to benefit both the development itself and the existing local landscape.

Water

Proposals should seek to manage surface water and drainage in a sustainable and ecologically beneficial way, where possible through Sustainable Drainage Systems (SuDS). These can be delivered in a variety of ways (subject to local planning authority approvals), with suitable proposals being reflected in your tendered scheme.

Commitment to Design Quality

A Design and Access Statement and layout has been submitted as part of the Reserved Matters Application. This will form the baseline for review and tendered proposals should achieve high quality design, taking full account of the site's opportunities and constraints and adding value where possible in order to create a distinctive residential environment.

The proposals should identify a planning and design strategy for the site, including an approach to engagement – comprising, amongst other things, the consultant team and programme setting out the key milestones to application submission.

Design quality must be maintained from tender through to delivery on site. Alongside Building for a Healthy Life (or its successor), proposals must demonstrate evidence of other measures taken to improve and ensure the quality of design.

If, in the opinion of Homes England, there is a discernible drop in the design quality between the reserved matters application layout and the developer's plot substitution layout, which will be submitted by the preferred bidder to Homes England for approval, then Homes England reserves the right to require the Reserved Matters application pack be **referred for Design Review** at the cost of the preferred bidder (Capped at £3k). This is to ensure that, where possible, the quality of design does not fall below the standards proposed at tender stage.

Section 6: Contracting Structure

The contractual arrangements around this site disposal are generally standard in so far as they will involve the selected development partner entering into:

- An agreement for lease
- A building lease
- A deed of overage

The developer's main obligation under the agreement for lease will be to obtain a reserved matters consent within a specified time period. Once the developer has discharged its obligations under the agreement for lease, the building lease will be completed. The developer will be obligated to start on site within a fixed period of following draw down of the lease – and once the development has commenced – it must achieve the practical completion of all dwellings in accordance with the programme it has tendered (which, in any event, cannot exceed 60 months).

The developer will also be contractually obliged to develop the scheme in accordance with the MMC techniques / specifications set out in its tender response to this ITT.

Payments of the agreed price premium must be made in accordance with the timings set out within the developer's tender.

Under Homes England's standard approach to land disposals; overage will be used as a mechanism for rewarding developers who build at pace.

In this regard, if the developer completes their scheme to the exact date set out in the contract – overage will be shared on a 50:50 basis. If the developer completes the scheme faster than the contracted date, then they will receive an increased share of overage (up to a cap of 70%) and if they complete the scheme slower than the contracted date they will receive a lesser share of overage (down to a lower threshold of 0%).

The faster the scheme is completed, the greater the share received and the slower the scheme is completed the lesser the share.

Developers will be given a 10% time tolerance on the contracted completion date. If they complete the scheme late – however within this 10% tolerance – the only impact will be that their share of overage will be less than 50% (with their actual percentage share being determined based on how late within the 10% time window they complete). Developers completing after the 10% time window may be subject to forfeiture.

Extensions of time to the contracted target completion date will be granted to developers should matters outside their control occur that cause unforeseen delays to the programme.

Contracting Parties

A financial vet of the preferred bidder will determine whether Homes England requires there to be a surety to guarantee the obligations and performance of the Developer. If the preferred bidder is an offshore entity,

then further "Know Your Client" checks will need to be satisfied. If a surety is required, the surety may either be a party to the agreement for lease (and subsequently the lease) or Homes England will accept a stand-alone deed of guarantee provided by the surety in Homes England approved form.

Bidders are responsible for making sure the contract structure and their proposals are acceptable to their Surety prior to submitting the tender.

Title Due Diligence

A title pack is issued with this ITT and includes documents relating to:

- Drainage Easement Option
- Electricity Cable Diversion
- Homes England title to the land
- Planning
- Search Results
- Transactional documents

Bidders are required to carry out their own title due diligence.

Developer Responsibilities

The following section sets out the services that HE's selected development partner would be required to perform and describes mandatory points that bidders must address within their tender submissions.

Developer Duties

- Secure Reserved Matters approval for their scheme, the basis of which must be consistent with the scheme tendered to HE as part of this ITT
- Comply with and otherwise discharge all appropriate planning conditions associated with the scheme
- Discharge payment of the scheme's agreed S106 cost and any costs associated with the Unilateral Undertaking
- Pay all SDLT costs owed in accordance with HMRC requirements. It should be noted that the site is Opted to Tax – meaning VAT is payable against the purchase price tendered
- Under certain qualifying circumstances, it may be possible for you to request that Homes England dis-applies VAT against the site. If you intend to do this, you must make this intention clear within your tender submission – along with the rationale that you would make to HMRC.

PLEASE NOTE: In the event that you have a legitimate claim to dis-apply VAT, Homes England would be required to repay all VAT it has claimed associated with its past spend against the site. Since this would be a non-recoverable cost to Homes England – the cost of the VAT that Homes England would be forced to repay to HMRC would be netted off your financial offer

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- Raise the level of finance required to cover the scheme's peak funding requirement – and arrange any credit lines that may be needed to meet cost overruns / cash flow shortfalls
- In respect of the affordable housing elements of the scheme, the developer must identify and work with an RP partner to take on responsibility for these tenures. This must be compliant with Harrogate Borough Council's affordable housing policy and approach to selecting an RP partner.
- Upon draw down of the Building Lease, coordinate effective management of the site and discharge all statutory health and safety duties
- Arrange the delivery and management of all construction activities across the site in compliance with the terms of the planning approval
- Secure all appropriate accreditations (NHBC, etc...) for completed dwellings such as to ensure they are insurable / mortgageable
- Manage all marketing and sales of dwellings across the site
- Carry out snagging activities and provide all appropriate maintenance and aftercare services to buyers
- Agree and complete adoption agreements with the local authority in respect of key roads within the development and with the local authority or a nominated management company in respect of the scheme's public open spaces
- Comply with any duties / services required of the developer under the terms of the warranty agreements provided to buyers
- Otherwise comply with any and all obligations set out within the Agreement to Lease and Building Lease

Mandatory Requirements to be reflected in Tender Submission

Bidders are required to tender submissions to this ITT which address the following mandatory requirements:

- Bidders must submit proposals for the site which 1) comply with the scheme's outline planning conditions and Homes England's Reserved Matters application with changes proposed only to the detailed design and detailed layout. This includes compliance with the housing mix included within Homes England's Reserved Matters application.
- Bidders must submit proposals for delivering s106 affordable housing that comply with Harrogate Borough Council's policy
- Bidders must demonstrate compliance with Building for a Healthy Life design toolkit principles through a self-assessment where the developer must score a minimum of 8 'greens' across questions 5 through to 12

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- The time frame tendered in relation to the period between the commencement of house building and the completion of house building must not exceed 60 months i.e. the minimum timeframe only relates to house building – and does not include time associated planning, site set up, enabling works / remediation works and sales activities
- Bidders must achieve a minimum score of 2.5 under the MMC evaluation theme. Please refer to the evaluation section of this ITT for further details in this regard
- In regard to financial offers:
 - A minimum of 5% of the tendered premium must be made payable on exchange of contracts on the Agreement for Lease as a deposit
 - A minimum of 10% of the premium must be made payable on completion of the Building Lease
 - The full balance of the premium must be made payable by the earlier of either a) the developer's mid point of their construction programme or b) the mid point of their sales programme
- The performance of the developer will be monitored through the duration of the build programme by a Compliance Inspector. The Compliance Inspector will be an independent firm or person appointed by Homes England from a list of Approved Compliance Inspectors. Homes England will submit the Compliance Inspector Brief to no less than 3 of the Approved Compliance Inspectors and invite them to tender. Homes England will evaluate all tender responses received and identify a preferred Approved Compliance Inspector and Homes England will notify the developer if the identity of the Compliance Inspector.

The Compliance Inspector's responsibilities are detailed in the Compliance Inspector Brief included in the Agreement for Lease and covers 4 main areas: Pre-Start on site meeting; Start on Site monitoring report; Monthly Monitoring reports and the Final Completion Certificate.

- Bidders are prohibited from including ground rents as part of their sales / revenue strategy for the scheme (unless demonstrated as being necessary in respect of flatted accommodation, etc...)
- Bidders must populate and submit all Tender Forms provided in the alongside this ITT
- Bidders must provide a written submission in support of their Tender Forms responses – and use this written submission to set out the various information requirements referred to in Section 7
- Bidders must provide all supporting plans, dwelling layouts, appraisal print outs and CGI images / drawings / photos required in support of your written submission

Section 7: Tender Submission Guide

Tender Forms

This ITT is provided alongside 8 Tender Forms which are to be completed / populated by bidders as part of their responses to this tender opportunity.

These are:

TENDER FORM 1: Property & Revenues Form

TENDER FORM 2: Cost Form

TENDER FORM 3: Project Timings

TENDER FORM 4: MMC Scoring Form

TENDER FORM 5: Building for a Healthy Life Guidance & Bid Template

TENDER FORM 6: Legal Clarifications Form

TENDER FORM 7: Conditions Form

TENDER FORM 8: Financial Offer Form

TENDER FORM 9: Affordable Housing Programme Grant Assumptions

Written Submission

Whilst the Tender Form responses will form a key part of the information that is assessed by Homes England (HE) to determine a preferred bidder – bidders are also asked to provide a Written Submission to support their offer.

Written Submissions are an opportunity for bidders to expand upon the responses given in their Tender Forms. The submission should be presented in the form of a single PDF document – and should be divided into 7 parts as follows:

PART 1: Scheme Plans & House Types

Bidders should provide:

- **PLAN 1:** A constraints and opportunities plan – with embedded commentary / photos to illustrate the nature of the opportunities / constraints identified. This plan should be provided at 1:1000 scale
- **PLAN 2:** A dwelling layout plan which shows the distribution of homes across the site marked by tenure and type – and with a corresponding embedded schedule of accommodation.

The same plan should be used to highlight your car parking layout for the scheme, showing the location of car parking facilities across the development that will serve residents and those that will serve visitors – and with an embedded schedule summarising the number of private and public visitor car parking spaces to be accommodated. This plan should be provided at 1:1000 scale

- **PLAN 3:** A street hierarchy plan (i.e. primary, secondary and tertiary streets), which also clearly shows the development's different means of access (vehicular, emergency vehicle, cycle and pedestrian). This plan should be provided at 1:1000 scale

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- **PLAN 4:** A landscape masterplan capturing the layout and specification details of your proposed public open space / public realm proposals. This plan should include embedded details (text and images) of existing landscape features that will be retained, examples of the proposed street furniture and play facilities you are proposing (if applicable), details of any bio-diversity features you propose to include as part of your scheme and the materials you propose to use across your public realm / public open space. This plan should be provided at a 1:1000 scale.
- **PLAN 5:** A plan of your scheme with 3 types of shading – the first to reflect privately owned spaces (i.e. the boundary of the house plots), the second to reflect space that is to be vested with a management company and the third to reflect land that will be adopted by the local authority. This plan should be provided at a 1:1000 scale
- **PLAN 6:** A construction and sales phasing plan – showing the proposed location of construction compounds, the location of sales outlets and details of your traffic strategy for managing construction traffic and sales related traffic across the development. This plan should be provided at 1:1000 scale
- **SCHEMATIC 1:** CGIs, photos or drawings of a maximum of 6 of the dwelling types you are proposing to use as part of your scheme – which highlight the variety in the typologies you are proposing, the elevational treatments you would seek to adopt and also the boundary treatments you are proposing to establish between the plot and the public realm.
- **SCHEMATIC 2:** A single CGI or drawing of one of your primary streetscapes within the scheme which can be used by Homes England to better understand the proposed character of your scheme (and which could also be used for promotional purposes when announcing the preferred bidder)

Submission to be limited to plans / drawings, as referred to above, only

PART 2: Design

Homes England is using Building for a Healthy Life as the toolkit by which it intends to measure design quality.

In order to demonstrate your approach to design, bidders should:

- Provide a Building for a Healthy Life self – assessment. This should be presented in the form of a table – which provides the following information:
 - Column 1: The BHL question
 - Column 2: Narrative on how your proposed scheme responds to the BHL question
 - Column 3: The self-assessed rating you have given yourself in respect of the answer you have provided (rating to be provided in the form of green (= fully adheres to the BHL principle), amber (= partially responds to the BHL principle) or red (= does not respond to the BHL principle) scoring system)

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- Populate Tender Form 5 (instructions on how this should be completed are provided in the introductory section of the form)

The self-assessment must be provided in the form of a table and included in the main body of your written submission.

The response to the design assessment must be provided by populating the template provided at Tender Form 5.

PART 3: Planning & Management

Bidders should:

- Outline why their tendered scheme would be successful in securing a reserved matters planning consent – including details of any interaction they have had with the local authority which has helped them in shaping their proposals for the scheme and which gives them confidence that they would secure planning approval
- Indicate what their long term proposed management arrangements are for all non-saleable parts of the scheme – and confirm the cost of these management arrangements and how they are to be funded (i.e. commuted sum payment netted off the land value, a management company paid for by residents through an annual management fee, etc...)
- In the event of bidders electing to have part of their scheme adopted by the local authority, they must confirm why they believe their chosen landscape materials would be acceptable for adoption

The responses to this question will be cross referenced against your responses to questions 8 & 9 within the Design Assessment (Tender Form 5) and should clearly set out the long-term management arrangements for the proposed scheme.

Responses should be limited to no more than 2 A4 pages / 1,000 words

PART 4: Values & Marketing Strategy

Bidders responses to this section should correspond to the information you have provided in your response to Tender Form 1.

Bidders should provide:

- Evidence to verify that their tendered sale values per sq.ft (across all tenures) are achievable
- Why they believe there is sufficient choice in your proposed house type range to maintain buyer interest over the course of the project
- Who they regard as being their core market audience

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- The marketing brands they will use and the types of promotional marketing activities they will use to maintain your tendered pace of sales
- Confirmation and evidence that their homes will be mortgageable and insurable (irrespective of MMC technology used), including details of the accreditations that your product types will secure

Responses should be limited to no more than 3 A4 pages / 1,500 words

PART 5: Project Risks & Programme

Bidders should provide:

- A risk register identifying:
 - The bidder's opinion of all the key risks / constraints associated with the project
 - The likelihood of the risk occurring
 - The likely impact of the risk
 - How the risk will be mitigated
 - A summary of the costs (if any) you have allocated to mitigation of the risk and whether these costs are accounted for as contingencies which have been netted off your land value offer
- A development programme (in a gantt chart format of their choosing) which demonstrates time allowances for all work stages associated with the project – and which corresponds to the timing set out in Tender Form 3

Response to be provided in the form of a table (risk register) and gantt chart (programme)

PART 6: Funding

Bidder should provide:

- A print out of their organisation's own internal development appraisal and cash flow for the scheme (at Homes England's discretion, we may ask you to provide these documents in an editable format)
- Details of the proportion of the scheme's Gross Development Cost that will be met from:
 - The developer's own equity
 - Debt
 - Recycled sales receipts
- In regard to those projects to be funded through debt, bidders must indicate:
 - Who their lender is / lenders are
 - The level of debt to be borrowed
 - Whether this debt is currently in place or still to be approved by the lender
 - In the event of their debt funding having already been approved, please provide evidence
 - What terms of security their investor requires

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- Please indicate how any cost overruns that might arise from the scheme would be paid for
- In the event that elements of the bidder's scheme are to be funded / part funded through forward sale arrangements (e.g. affordable housing, PRS, etc...), the bidder must indicate:
 - Who their forward sale investor is / investors are
 - The stage payment terms they have agreed with this party
 - The status of the legals between the bidder and forward funder (i.e. no agreement yet in place, heads of terms agreed, conditional agreement in place, etc...)
 - That your forward funder is satisfied with the Golden Brick security arrangements referred to in the legal pack provided by Homes England

Responses should be limited to no more than 1 A4 pages / 500 words – with the developer's appraisal and cash flow provided as a separate appendix to their submission

PART 7: Resource & Expertise

Bidders should provide:

- A case study demonstrating their track record for delivering a scheme / schemes of a similar scale and with a similar peak debt / gross build cost to this scheme
- Confirm that they have the necessary in-house staffing, financial and supply chain capacity to successfully resource a project of this scale within the timescales tendered
- In respect of those members of your consultancy team or sub-contractors who will have either i) design responsibility or ii) will be appointed on the basis of work packages valued at £2m or more:
 - Details of who these organisations are
 - Confirmation that collateral warranties, IPR and step in rights can be provided in the event of your withdrawal from the project

Responses should be limited to no more than 2 A4 pages / 1,000 words

Future Homes Standard - Changes to Part L and Part F of the Building Regulations for new dwellings

As part of this tender process, bidders are invited to submit land value offers to Homes England that reflect the building regulations that will apply to the development. This should reflect the recent changes to Building Regulations Parts L & F.

Tenure Diversification and the use of Grant Funding administered by the Shared Ownership and Affordable Housing Programme (SOAHP)

It is recognised that our partners may wish to submit tenders that comprise tenure diversification above the tenure requirements set out in the S.106 agreement and this may trigger the eligibility for grant funding

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under the SOAHP. If you are intending to submit a tender that proposes tender diversification and the inclusion of SOAHP grant funding please consider the following.

- The panel member submitting the tender will be required to maintain the contractual relationship with Homes England throughout the lifetime of the development. The only legal interest available to any additional RP/ PRS partners will be a sub-lease interest or development agreement until the freehold transfer becomes eligible in accordance with the terms of the building lease.
- Use of SOAHP grant funding is only available on the delivery of affordable housing over and above the provision set out in the S.106 agreement and is subject to the status of the overarching grant programme at the time of tender submission.
- Where a tender includes the use of SOAHP grant funding the bidder **must complete Tender Form 9** detailing the grant assumptions that have been used to support the land value offer.
- Value for money is a central consideration in the administration of grant funding, and for this reason in order to be eligible for grant developers must demonstrate that the proposed transfer value (inclusive of any assumed grant) reflects a minimum discount of 10% from the open market value of the property.
- Any proposed AHP funded home and development will otherwise need to be entirely compliant with the AHP Capital Funding Guide where this cannot be demonstrated the tender will not be deemed acceptable.

Grant assumptions will be reviewed by Homes England on receipt of your tender submission and in the event the assumed level of grant is deemed unacceptable you may be asked to re-calculate your offer based on revised assumptions provided by Homes England.

Section 8 – Evaluation of Bids

Homes England intends to use responses provided to this ITT to appoint a single preferred bidder for the site.

The Written Submission and completed Tender Forms provided by bidders will be assessed against the following three assessment themes:

- Pass / fail
- Non-price – accounting for 30% of marks
- Price – accounting for 70% of marks

The bidder who 1) passes each of the pass / fail requirements and 2) who scores the highest unique mark out of 100 will be appointed as HE's preferred development partner.

Pass / Fail

Tender proposals put forward by bidders must incorporate all mandatory requirements, as set out in Section 6 of this ITT. Tender submissions must also include all information required by Homes England, as set out in Section 7.

Should bidders fail to incorporate any of Homes England's mandatory requirements within their scheme proposals and / or fail to provide all information requested by Homes England as part of their submissions, then the bidder's tender proposal will not be put forward for evaluation against the price / non-price criteria, and will be discounted from the bidding process.

At its own discretion, Homes England may consult with the local planning authority to independently ascertain the likelihood of each bidder's tendered scheme securing a planning consent.

In the event that the local authority does not believe the scheme proposed by the bidder would secure a Reserved Matters approval, the bidder's submission – at Homes England's discretion – may be discounted from the bidding process.

Non Price

Non-price elements of the scoring will account for 30% of marks. The following summarises how scores within the non-price category will be apportioned:

10% - Design

10% - MMC

10% - Developer's understanding of the technical risks and project constraints

Price

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Price elements of the scoring will account for 70% of marks. The following summarises how scores within the price category will be apportioned:

10% - Cost robustness

60% - Price

A detailed evaluation guide is provided in the ITT appendices, setting out how the information HE has requested in Section 7 will be evaluated and scores awarded.

This includes details of what information must be provided to achieve a 'pass' against the pass / fail criteria and example calculations to show how score formulas are intended to operate.

Section 9 – Programme & Bidding Deadline

The following programme indicates key milestones within the ITT procurement programme:

Milestone	Date
Soft launch of data room	
Formal launch of ITT	07.06.21
Mid-Tender Meetings (if required by bidders)	w/c 28.06.21
Close date for bids	30.07.21
Post-Tender Clarification Meetings (if required by HE)	w/c 09.08.21
Confirmation of Preferred Bidder	07.10.21
Completion of Agreement to Lease with Preferred Bidder	20.11.21

Bidders must submit their tenders via the DPP3 e-tendering system. Accordingly, bidders should be aware that tenders need to be submitted in an electronic format only – and that the submission of hard copies is not permitted.

Bidders are required to upload their tenders through the e-tendering system by a time / date not later than **1pm, Friday 30th July 2021**.

Section 10 – Mid Tender Meetings & Contact Details

Mid Tender Meetings

HE intends to give bidders the opportunity to have a mid-tender meeting. In this regard, HE proposes to allow time during the week commencing 28th June 2021 to meet each bidder individually to discuss any queries they might have.

Time slots with each developer will be agreed in due course. Attendance at the mid tender meeting is not mandatory – and the offer of a mid-tender meeting session only needs to be accepted by bidders if they feel a meeting with the Agency would be beneficial in clarifying uncertain aspects of the tender.

Aside from mid tender meetings, bidders are welcome to raise queries / seek clarifications through the e-tendering system at any time during the ITT tender window. In this regard, HE will aim to respond to any queries raised within 3 working days of the question being posted.

Unless the question or HE's given response is commercially sensitive in respect of a bidder, all questions and answers provided through the mid tender meeting process or e-tendering system will be shared on an equal basis with all bidders.

Contact Details

The lead contacts in relation to this ITT are as follows:

Lucy Eyeington

Lucy.Eyeington@homesengland.gov.uk

Martin Wilks

Martin.Wilks@homesengland.gov.uk

All enquiries concerning this ITT should, in the first instance, be directed through the e-tendering system.

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