

**CONSULTANTS BRIEF.**

**PREPARATION OF RETAIL, LEISURE AND TOWN CENTRE USES STUDY**

**JULY 2019.**

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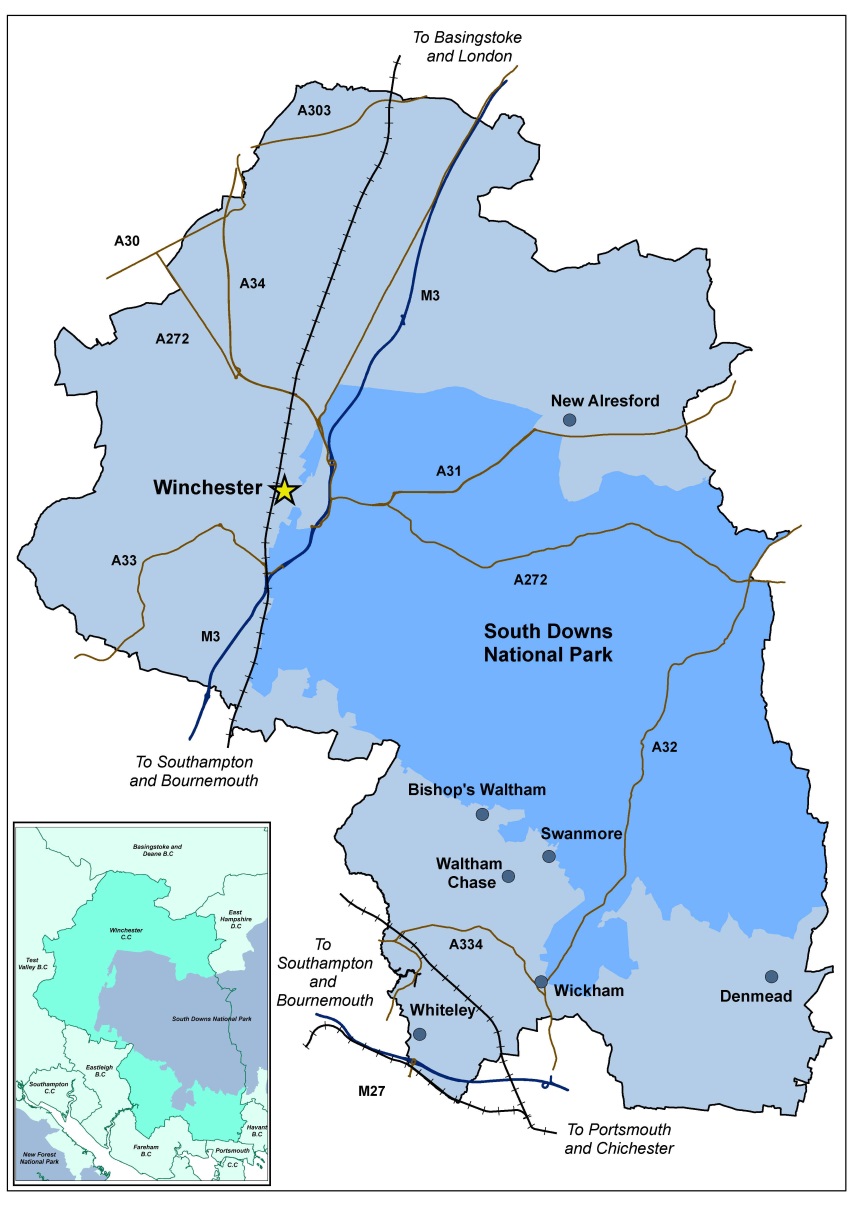
**1 Introduction and Background**

1.1 Winchester District lies within central/southern Hampshire bordered by Basingstoke and Deane, Portsmouth, Havant, Fareham, Test Valley, Eastleigh, and East Hampshire local authorities. A number of these are influential in the way Winchester District functions and is used by its residents.

1.2 The District covers an area of 64,750 hectares with a resident population estimated to reach some 126,000 people (in 52,000 dwellings) in 2019. The District is mainly countryside interspersed with many small towns and villages. The main centre for retail activity is the city of Winchester, with other main centres in the rural part of the District being Alresford, Bishops Waltham, Denmead, Wickham and Whiteley. Approximately 40% of the District lies within the South Downs National Park, which is a separate planning authority and has its own Local Plan, although this area accounts for only about 8% of the District population.

1.3 The Council is looking to shape the District’s economic future and to develop planning policies which will facilitate this. There are currently two key Development Plan Documents setting out planning policies for the District: Local Plan Part 1 (Core Strategy) and Local Plan Part 2 (Development Management and Site Allocations). Work has started on a new Local Plan which will replace and roll forward these plans to 2036. Therefore, the Council is wishing to appoint a firm of consultants to undertake retail, leisure and town centre uses needs assessments to inform the preparation of its Local Plan 2036. The City Council’s Local Development Scheme (LDS) was adopted in December 2018 and sets out the timetable for preparation of the new Local Plan <http://www.winchester.gov.uk/planning-policy/local-development-scheme>

1.5 A map of the District illustrating the neighbouring authorities, South Downs National Park Area, key settlements, roads and railways is included below. More information about the District and the Council can be found on the Council’s website [www.winchester.gov.uk](http://www.winchester.gov.uk).



1.6 The Council Strategy for the period 2018 – 2020 includes the overarching vision of Winchester City Council which is to combine a blend of innovation, aspiration and pragmatism when delivering local services, looking beyond the traditional ways of doing things. The City Council is committed to;

* Making the District a premier business location
* Developing quality housing with a balanced range of tenures
* Protecting and enhancing our unique environment
* Delivering services that encourage residents to lead healthy and fulfilling lives.

The outcome of our combined aims will be a district where everyone enjoys the opportunities and quality of life that comes from living in the Winchester District.

* 1. There are a number of major developments under construction in the District at Barton Farm (‘Kings Barton’) on the outskirts of northern Winchester; West of Waterlooville (‘Berewood’) which shares a boundary with and is partly within Havant Borough in the south east of the District; and North Whiteley where the town centre has undergone significant changes in recent years and work is starting on an urban extension of 3,500 new homes, educational provision, open space and green infrastructure network.
  2. There are two adopted Local Pans covering the District:

**Local Plan Part 1** was adopted in March 2013 and sets out the strategic priorities for the District. The evidence base to inform LP1 included the 2007 Retail and Town Centre Uses Study and several subsequent updates, which can be viewed at <https://www.winchester.gov.uk/planning-policy/evidence-base/evidence-base-economy>. There are various references throughout the Plan to retail and town centre uses. The Retail Study at that time (2012 update) suggested a need for about 12,000 sq m of (net) new retail floor space (A1) across the District to 2031. The Plan’s key relevant policies reflect this and include:-

* + - 1. DS1 - Development Strategy and Principles
      2. WT1 - Development Strategy for Winchester Town
      3. MTRA2 - Market Towns and Larger Villages
      4. CP9 - Economic Growth and Diversification

**Local Plan Part 2** was adopted in April 2017 and only applies to that part of the District outside the SDNP. The evidence base was updated to inform LP2 and can be viewed at <https://www.winchester.gov.uk/planning-policy/evidence-base/evidence-base-economy>. This resulted in updated projections (2014 Retail Study) for the quantum of retail floor space being planned in Winchester Town (see LPP2 paras 3.5.1 – 3.5.5). Town centre boundaries and primary shopping frontages were reviewed as part of LPP2 and the following relevant policies apply to proposals:-

* + - 1. WIN2 – Winchester Town Centre
      2. WIN4 – Silver Hill Mixed Use Site
      3. WIN5-7 – Station Approach Development Principles and Proposals
      4. WIN11 - Winnall
      5. DM7 – Town, District and Local Centres
      6. DM8 – Primary Shopping Frontage
      7. DM0 – Secondary Shopping Frontage
  1. Policy WIN4 of LP2 requires a Supplementary Planning Document (SPD) to be prepared to add more detail to the area of Winchester City Centre known as ‘Central Winchester Regeneration’ (now ‘Saxon Gate’). The Central Winchester Regeneration SPD was adopted in June 2018 and identifies key themes for the area and how these can be delivered. Much of this area now lies in the Council’s ownership and projects are being initiated to implement the SPD. Further details of the CWR project can be viewed at <https://www.winchester.gov.uk/projects/5744/central-winchester-regeneration>. As part of this project a retail market report was prepared by Propernomics consultancy and this can be viewed at <https://www.winchester.gov.uk/assets/attach/13454/Retail-market-report-Winchester-commentary-2017-combined.pdf>.

1. **Requirement for a Retail, Leisure and Town Centre Uses Study**
   1. An updated retail, leisure and town centre uses study is needed to provide robust and up to date evidence relating to these uses to inform the development strategy and policies of the Local Plan 2036. Current planning policies reflect the conclusions of the 2007 Retail and Town Centre Uses Study and its various updates, the latest of which was in 2014. There have been significant changes in relation to town centres since the previous studies, particularly in relation to internet shopping, the fortunes of the ‘high street’ and Government policy.
   2. The study will need to reassess the existing hierarchy of town centres, as expressed in Policy DS1 of Local Plan Part 1, to confirm or otherwise the appropriateness of the categories of retail centre, taking account of their role and function, catchment characteristics, vitality and viability, etc.
   3. The study should quantify the likely need for retail, leisure and other town centre uses throughout the District until 2036 and express this as an amount of additional (or reduced) floorspace for the various uses. It should identify the main centres where there is a need for further retail, etc development and assess potential sites to accommodate any additional floor space requirements (or where land/buildings may become surplus to retail, etc needs). The study should advise on the future hierarchy and spatial planning strategy for the main commercial centres in the light of current and anticipated changes to shopping and leisure patterns.
   4. All work should meet the requirements of Government guidance (NPPF and NPG) and best practice advice. The evidence, analysis and conclusions should be robust and of a quality that will be found to be ‘sound’ when the Local Plan is examined in due course.
2. **The Project Specification** 
   1. This study needs to assess the appropriateness of adopted Local Plan strategies and policies in light of revised Government guidance and changes to the retail and town centre markets. It should address particularly the requirement to the meet the need for main town centre uses in full through adopting a town centre first approach.
   2. The study should provide a quantitative and qualitative analysis of the District in terms of the requirements of section 7 of the revised NPPF. This needs to consider changes in the retail/leisure markets and other research and evidence of changes being experienced such as on-line shopping.
   3. There have been a number of relaxations of national planning policy in recent years through changes to permitted development rights and more are currently being considered. The study will need to consider the impact these have had on the shopping areas of the District and what future function and mix of uses is needed in the town and district centres to ensure their ongoing vitality and viability.
   4. Paragraph 6.3.10 of LPP2 refers to a requirement for impact assessments for proposals for retail, leisure and office development outside of defined town centres for those uses that have a floorspace of 1000m2 or more in Winchester town and 500m2 elsewhere. The study should assess whether these thresholds are still appropriate. There is also reference to small scale town centre uses up to 278m2 to serve the immediate locality being considered appropriate outside of a defined centre (LPP2 para 6.3.11) and the study should consider whether this is still an appropriate threshold.
   5. Whiteley shopping centre has undergone significant changes through redevelopment and expansion in recent years. There should be an assessment of its role in the wider area and whether its position in the retail hierarchy, as expressed in Policy DS1 of LP1, has changed.
   6. Similarly in Winchester, the area around Winnall has changed with a number of out-of-centre bulky goods units and trade counters being developed, Policy WIN11 of LPP2 reflects the Winnall Planning Framework undertaken in 2015 and divides the area into sectors to reflect these uses. Advice is required on whether this approach remains appropriate and on the scale of provision for out of town floor space that is needed (if any), taking account of overall requirements and the capacity in town centre / edge of centre sites.
   7. Having regard to the existing retail hierarchy (Policy DS1), or any new hierarchy that may be proposed, the study should recommend individual planning strategies for the named centres to reflect their character, capacity and resilience, in the light of changes in retailing and projected population changes. This should include any complimentary strategies that could be identified to support the role and function of the centres.
   8. The City of Winchester Movement Strategy was completed and adopted in Spring 2019 and establishes some key parameters for vehicular movement to and around Winchester itself, including references to parking. The Council has also recently commissioned a Hotel Study, looking at hotel performance and markets research, which it is anticipated will be finalised and published in July 2019, providing an insight into this aspect of leisure provision/needs.

Procedure

* 1. The study will be broken down into two stages as follows:

**Stage One - Quantitative and Qualitative Assessments**

* 1. The study should identify the quantitative and qualitative need for additional or reduced retail, leisure and other town centre use floorspace (excluding office floorspace as this will be covered by the separate Employment Needs Assessment study) over the plan period 2016 – 2036. This should include assessments for each 5-year period within this timescale.
  2. The analysis should identify existing and projected catchment areas for convenience and comparison goods, retail warehousing, leisure development and other key town centre land uses (excluding offices). An analysis of current and projected expenditure should be undertaken for these sectors and should identify any expenditure leakage (or gains) for the District or individual centres. As part of this, the consultants should review any major current or planned retail developments in the study area and adjoining centres/districts so as to assess their potential impact on the District and its centres.
  3. The analysis will need to take account of the population changes arising from the known and planned housing growth identified in the adopted Local Plans and those of neighbouring LPA’s who, due to geographical proximity, rely on centres in the District. The Council has commissioned a ‘Future Local Housing Need and Population Profile Assessment’ which will include future population projections and analysis (to 2041) and is due to be published in time to inform the study.
  4. The consultants should undertake an assessment of the main commercial centres, to include strengths and weaknesses, following discussions with retailers and relevant chambers of commerce and designated BIDS. The study should identify any specific roles or niche markets that these centres serve or could develop. Based on this, together with demand analysis, the study should suggest centres where growth (or contraction) may be needed and where specialist roles could be developed. The consultants should review the existing retail hierarchy and advise on its continued appropriateness, or an alternative hierarchy.

**Stage One Output**:

* 1. A report containing the assessment results for each centre and including a recommended town centre hierarchy for the District or options/scenarios for the hierarchy if applicable, with a reasoned justification.
  2. The report is to include identifying the catchment areas for the main centres of the District, presented with expenditure data analysis and identifying any leakages from the centres. The report should also quantify the projected floorspace requirements for convenience and comparison retailing, retail warehousing, leisure and other relevant key town centre land uses, by individual centre, including different options for development and specialist roles as necessary.

**Stage 2 - Capacity Analysis & Site Identification**

* 1. The consultants will be required to explore the capacity of the main centres identified to meet the quantities of development needed, as identified in Stage One, and identify the options for each centre to meet these. This should include recommendations as to where town centres could be expanded, or contracted if the evidence suggests. Significant sites with potential for meeting floorspace needs, or that may become surplus to requirements for town centre uses, should be identified along with any constraints to their development.
  2. Having discussed the findings of Stage One with the Council, the consultants should develop scenarios for each centre which seek to at least maintain existing levels of vitality and viability. It may be appropriate to consider the designation of additional sites, either in town centres, edge of centre or out of centre, for both retail and other town centre uses, or to consider alternative uses for existing sites that are unlikely to be needed for their current use in future.
  3. Primary and secondary shopping frontages were reviewed as part of the preparation of Local Plan Part 2. However with the publication of revised NPPF there is reference to the need for town centre boundaries to be kept under review, given the retail hierarchy, and the study should assess whether the town centre boundaries as defined in Local Plan Part 2 are still appropriate. In addition, the study should review whether it is still appropriate to include secondary shopping frontages and/or whether the extent of defined shopping frontages should be reconsidered and refined as primary shopping areas.

**Stage 2 Output:**

* 1. A report recommending strategies for each main identified centre to at least maintain existing levels of vitality and viability and proposals for altered boundaries for town centres where appropriate. These should be based on the evidence from Stage One, including current and projected levels of expenditure over 5-year periods to 2036. This should also include reference to primary shopping frontages/areas and the relevance or not of secondary shopping frontages.
  2. If significant additional sites are required, the report should identify potential sites as appropriate to meet the needs / strategies identified. The report should provide an explanation of why they are required, particularly any edge or out of centre sites recommended, and an assessment of their deliverability. This report should also advise of potential new uses for significant sites which may become surplus to requirements or with redevelopment potential.

1. **Timescale**

|  |  |
| --- | --- |
| Client issues brief | 1 July 2019 |
| Deadline for bids to be submitted to the Council. | Midday 19 July 2019 |
| Selection of the preferred consultant. | 5 Aug 2019 |
| Inception meeting. | w/c 12 Aug 2019 |
| Deadline for Draft Stage 1 report. | 6 Sept 2019 |
| Deadline for Final Stage 1 report. | 20 Sept 2019 |
| Deadline for Draft Stage 2 report. | 18 Oct 2019 |
| Deadline for Final Stage 2 report | 1 Nov 2019 |

* 1. Bids should indicate whether it is realistic to achieve a more rapid timescale. Please note that these dates cannot be changed to accommodate individual bidders. The Council reserves the right to change the dates at its sole discretion. Interviews if necessary and the inception meeting will take place at Winchester City Council’s Offices in Colebrook Street, Winchester

1. **Content of The Bid**
   1. Your bid should be presented electronically using no less than 11pt font size together with the any supporting documents. The following details should be included. The scoring for submissions is set out in the scoring criteria table below:

* Company name, lead consultant and supporting staff qualifications and experience and time to be spent on project by different team members, and contact details;
* Brief details of 3 similar pieces of work that have been undertaken in the last 5 years including the cost and contact details for references.
* Details of any sub – contractors likely to be involved in the project.
* Proposed project plan setting out the process you will go through to complete the work and showing how you will meet the requirements set out in this brief.
* Confirmation that you can deliver to the set deadlines.
* Total cost of the work including a breakdown of the costs of each of Stages 1 and 2 to include expenses and an additional daily cost for attendance at the Local Plan examination, if needed.

1. **Evaluation process and criteria**
   1. All bids will be evaluated in the following sequence:

* Check that the bid contains confirmation that the work can be delivered to the set deadline and the assigned personnel will be available to attend the Local Plan Examination if necessary.
* Final scoring
* Decision on appointment.
  1. The bids will be evaluated as follows;

40% on price

60% on quality.

* 1. Quality questions will be assessed against the scoring criteria set out below, using the scoring guide set out in Appendix 1.

|  |  |
| --- | --- |
| Scoring Criteria | Score Available. |
| Content complies with section 3 of the brief;   * Quality and robustness of proposals to achieve Stage 1 * Quality and robustness of proposals to achieve Stage 2 * Quality and robustness of proposals to achieve Stage 3 * Any additional considerations / proposals to help achieve the aims of the Assessment | 10  10  10    5 |
| Demonstrate that the organisation has the necessary experience to complete the work successfully and to the set programme;   * Experience of relevant similar work in the last 5 years, * Clarity, structure and content of the project plan. | 5  5 |
| Allow for sufficient suitably qualified and experienced personnel and that a suitable amount of time is allocated to the work by these individuals;   * Suitably qualified personnel assigned to the work * Suitable amount of time is allocated to the work by these individuals. | 10  5 |
| Price | 40 |
| Maximum score available. | 100 |

* 1. The lowest priced bid will score 40 marks and each higher bid will lose 1% (0.4 marks) for each 1% in price that they are higher than the lowest priced bid. The maximum reduction in marks applied will be 40 marks. The Council reserves the right not to award the contract to the highest scoring bidder, or to any bidder.
  2. Following the selection of the preferred bidder there will be an inception meeting at which contractual details can be finalised and any further clarification sought. A letter of engagement will then be issued and must be accepted within 1 week in order for the contract to begin.

1. **Submission of bid**
   1. Bids should be received by 12.00 midday on 19 July 2019. Please email one electronic copy to;

Jenny Nell

Strategic Planning Manager

Winchester City Council

City Offices

Colebrook Street

Winchester

SO23 9LJ

Email: [jnell@winchester.gov.uk](mailto:jnell@winchester.gov.uk)

* 1. If there are any queries regarding the overall brief please contact:

Jenny Nell 01962 848278 or email, [jnell@winchester.gov.uk](mailto:jnell@winchester.gov.uk)

Jill Lee 01962 848575 or email, [jlee@winchester.gov.uk](mailto:jlee@winchester.gov.uk)

* 1. If there appears to be an error or omission in a bid the Council will invite the Supplier to confirm the submitted price, including errors/omissions, or amend the submitted price to correct these errors/omissions. All amendments or confirmation of bids must be confirmed in writing by the Supplier.
  2. The Council reserves the right to disregard any bid where in the opinion of the Council:

(a) there is sufficient doubt as to the Supplier’s ability to perform the contract for the submitted price; or

(b) it does not fulfil a mandatory requirement; or

(c) it contains qualifications that conflict with the Consultants Brief instructions.

* 1. Bids and supporting documents shall be in English and any contract subsequently entered into and its formation, interpretation and performance shall be subject to and in accordance with the law of England.

1. **Award Process**
   1. Suppliers will be notified via email as soon as possible of any decision made by the Council during the quotation process, including notifying suppliers of the intended award.
   2. Suppliers must not undertake work without first having received an Official Purchase Order as written notification that they have been awarded the contract and are required to start work.
   3. As part of the notification of award process, suppliers will be provided with details of the points awarded for their submitted responses in line with the evaluation criteria above.
2. **Conditions**
   1. The Council reserves the right to withdraw from using the services of the consultant at any time during the project if it is not satisfied with the standard or quality of the work. No part of the study should be sub-contracted to third parties without the Council’s prior consent. If consent is given sub – contractors should have the same insurance requirements as the main contractor.
   2. The appointed consultant shall at all times be fully covered by professional indemnity insurance (£5 million professional for each and every claim and also confirm that such insurance will be maintained until the expiry of 12 years following the date of completion of the services). The appointed consultant shall at all times be fully covered by Employers Liability (£10 million minimum indemnity limit). The appointed consultant shall at all times be fully covered by public liability insurance (not less than £10 million for any one occurrence or series of occurrences arising out of one event, the total number of events being unlimited).
   3. The Council will own the copyright of the final report and will have the right to copy, publish and distribute it as required (subject to the work being accredited to the consultant).
   4. It is essential that the Consultant is satisfied that there is no conflict of interest that would undermine the value or integrity of the advice provided.
   5. Payment of fees will be at the end of the project, subject to the Council’s satisfaction. Any work outside the specification of the Brief, or as subsequently agreed in writing between the Council and the appointed consultants will be considered as additional work. The parties must first agree the content and cost of any such work before it is undertaken.
3. **Freedom of Information**
   1. The Supplier acknowledges that suppliers are subject to the requirements of the Freedom of Information Act 2000 (‘FOIA’) and the Environmental Information Regulations 2004 and shall assist and cooperate with the Council to enable the Council to comply with its information disclosure obligations.
   2. The Supplier acknowledges that, except for any information which is exempt from disclosure in accordance with the provisions of the FOIA, the content of this quotation is not Confidential Information. The Council shall be responsible for determining in its absolute discretion whether any of the content of this quotation is exempt from disclosure in accordance with the provisions of the FOIA.
   3. For the purposes of the requirement set out above, “Confidential Information” means any information which ought reasonably be considered to be confidential however it is conveyed, including information that relates to the business, affairs, developments, trade secrets, know-how, personnel and suppliers of the Supplier, including IPRs, together with all information derived from the above, and any other information clearly designated as being confidential (whether or not it is marked as "confidential") or which ought reasonably to be considered to be confidential.
   4. By submitting a quotation response the Supplier hereby gives their consent for the Council to publish this quotation in its entirety (but with any information which is exempt from disclosure having been redacted in accordance with the provisions of the FOIA).

Local Government Transparency Code

* 1. We are required to comply with the Local Government Transparency Code, details of which can be found on our website: <https://www.winchester.gov.uk/about/access-to-data>.

1. **Privacy Policy**
   1. Please refer to the Council’s [Privacy Policy](https://www.winchester.gov.uk/about/privacy-policy) on our website to see how the Council will use any personal data that you provide us with.

**Appendix 1 Scoring guide**

The following scoring guide will be used to evaluate submissions. Each of the questions will be initially scored out of 5 and then weighted in accordance with the scores set out in the scoring criteria. For example, if a maximum of 10 points is available for a scoring element, then the score out of 5 will be multiplied by 2 and so on.

|  |  |  |
| --- | --- | --- |
| SCORE | DEFINITION | BENCHMARK |
| **5** | Excellent | In the opinion of the evaluators, the response provides the information which :   * addresses all requirements, and * provides excellent quality relevant supporting evidence which to some material degree provides evidence of an exemplary response and * fully meets all WCC’s expectations including demonstrating innovative approaches to achieving outcomes in the brief. |
| **4** | Very good | In the opinion of the evaluators, the response provides information which:   * addresses all requirements and * provides very good quality relevant supporting evidence which to some material degree provides evidence of a very good response, and * meets the WCC’s expectations in all material respects with no weaknesses or areas of concern. |
| **3** | Good | In the opinion of the evaluators, the response provides:   * good quality information which addresses all requirements; but * the supporting evidence is less than good in some material degree or is of limited relevance to the response. |
| **2** | Marginal | In the opinion of the evaluators, the response provides information which addresses all requirements BUT the response:   * fails to provide relevant supporting evidence or * the evidence is not relevant to the response. |
| **1** | Poor | Fail |
| **0** | No submission | Fail |

**Appendix 2 Bibliography**

* Council Strategy 2018 – 2020

<http://www.winchester.gov.uk/about/strategies>

* Retail and Town Centre Uses Study 2007

https://www.winchester.gov.uk/assets/attach/4885/3.8RetailandTownCentreUsesStudy2007.pdf

* Update to Retail and Town Centre Uses Study 2010

<https://www.winchester.gov.uk/assets/attach/12882/RetailStudyUpdate2010.pdf>

* Update to Retail and Town Centre Uses Study 2012

<https://www.winchester.gov.uk/assets/attach/3623/4.12-Evidence-Update-Retail-Study-Update-2012.pdf>

* Update to Retail and Town Centre Uses Study 2014

<http://www.winchester.gov.uk/planning-policy/evidence-base/evidence-base-economy>

* Evidence base to Local Plan Part 1 and 2

<https://www.winchester.gov.uk/planning-policy/evidence-base/evidence-base-economy>