



Homes
England

Development and Regeneration Technical Services (DARTS) Framework

Further Competition Invitation to Tender (Stage 3
Over FTS Threshold)

Connaught Barracks, Dover (Main Site)

Issue Date: 2 August 2023

ProContract Identification Number: DN676474



Introduction

The purpose of this Further Competition Invitation to Tender (ITT) is to award the call-off contract for the above commission.

We ask you to respond to the questions detailed in Part 2, Section 6 (Evaluation Criteria) using the Response Form and to return the Response Form and Resource and Pricing Schedule in Part 3 with your tender.

This Further Competition ITT is divided into 3 parts:

Part 1 – Commission Requirement

- Details the commission requirements.
- Details additional terms and conditions for the Further Competition. The successful Supplier will be subject to both the terms and conditions of this Further Competition and the Framework Contract. Unless otherwise defined in these instructions, terms used shall have the meaning given to them in the Framework Contract.

Part 2 – Instructions for Submitting a Response

- Contains important information and instructions on preparing and submitting a tender response. Please read these instructions carefully prior to submitting your tender response.
- Outlines the evaluation criteria which will be used for assessment. It is important that Suppliers familiarise themselves with the criteria and ensure they are considered when compiling their tender response.

Part 3 – Standard Forms

- Contains the standard forms required to be completed and returned by the Supplier when submitting a tender response.

Part 1 - Commission Requirements

A PROJECT BRIEF

1. Commission background

- 1.1 On 27 September 2021, outline planning permission under application reference 19/00447 was granted at Connaught Barracks (Main Site) as shown in Figure 1 for the following development:

“Outline planning application with all matters reserved, except site access, for the erection of up to 300 dwellings, associated internal access, parking, road/footway/cycleway provision, open space, landscaping, surface water drainage, ancillary works (engineering works concerning movement of aggregate), and the detailed matter of highway junction works.”

- 1.2 The permission was granted subject to 43 conditions and a S106 agreement.

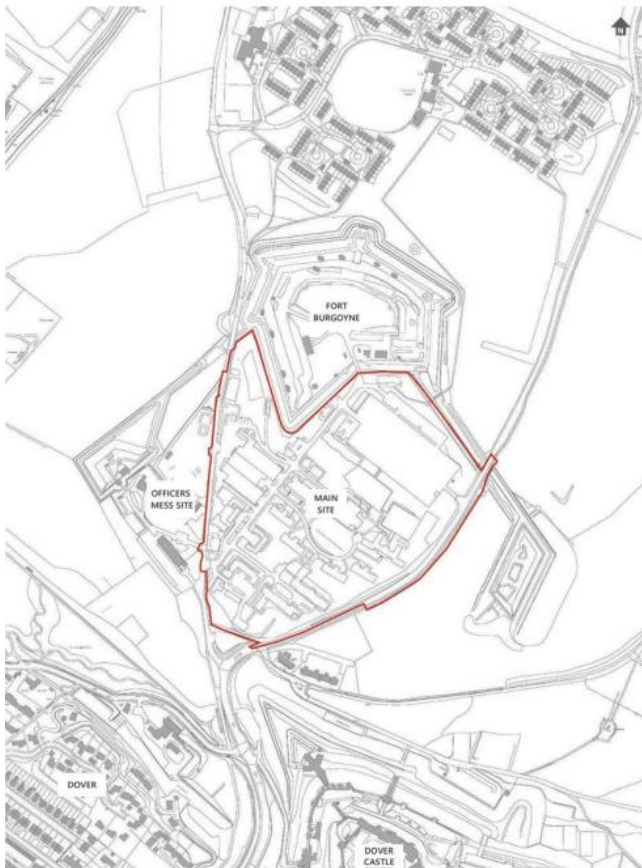


Figure 1: Site boundary

- 1.3 The site was marketed via the Delivery Partner Dynamic Purchasing System (DPDPS) in August 2022 with the objective to receive offers conditional on reserved matters approval only. The procurement process was ended early as it became clear that developers required a greater certainty of the ground conditions without which they were only willing to submit offers on a conditional basis. Since then, the Homes England Development Team has worked with Tetra Tech to identify the additional due diligence work that is required prior to taking the site back out to the market in early 2024.

1.4 This commission is to appoint a professional services team which will carry out two streams of work for the site at Connaught Barracks (Main Site), herein referred to as:

- **Part 1: Technical Due Diligence (site wide)**

Previous ground investigations were all undertaken at an early stage and in the scheme's conceptualisation and therefore scoped to provide a broad overview of ground risks. Outline planning permission is in place providing a development opportunity for up to 300 residential dwellings, arranged to the north and south of the proposed Bus Rapid Transit (BRT) route connecting Dover Road with the A258. As detailed by the Landscape Master Plan, the conceptual plans include dwellings, parking spaces and private gardens, all arranged around a network of secondary roads and pedestrian footpaths set within open communal landscaped areas. Existing mature trees along the north and south perimeter and within central areas of the site may be retained. Sustainable Drainage Systems (SUDs), inclusive of attenuation ponds may be incorporated into the landscaped areas. The Master Plan also includes a school on the south side of the BRT in the east of the site. The purpose of this contract is to undertake ground investigations and provide factual data inclusive of geotechnical parameters and contamination / land quality data.

- **Part 2: Preparation, submission and approval of Reserved Matters application (RMA) and preparation, submission and approval of supporting amendments and/or condition discharge applications to the outline planning permission (Visitor Car Parking and entrance area)**

Condition 5 of the outline planning permission requires the first reserved matters to be submitted no later than 3 years from the date of this permission.

To comply with Condition 5, whilst the additional due diligence and new marketing exercise are being progressed, Homes England is seeking to prepare and submit an infrastructure led Reserved Matter Application (RMA).

The infrastructure-led RMA will comprise the proposed 50 visitor car parking spaces secured in the outline planning permission for Fort Burgoyne and any associated works.

This commission is to appoint a professional services team to prepare, submit and support determination of a RMA with constraints fully identified and a timetable.

The commission further includes the preparation of discharge of condition application(s) and/or S73 or S96A application(s) to the outline permission, and preparation/support to an appointed legal team to prepare a Deed of Variation, to facilitate a proportionate application submission package for the proposed RMA. Further detail on the conditions anticipated to be amended is set out below.

1.5 The purpose of this Invitation to Tender is to award the call-off contract for the above project. We ask you to respond to the questions detailed in the Evaluation Section below using the Response form and to submit your pricing using the Resource/pricing schedule provided.

1.6 The professional team will put together a bespoke multi-disciplinary team of leading practitioners/disciplines to meet the specific requirements of this brief. A bespoke team is at the discretion of the lead consultant from the panel but does not necessarily have to comprise specified multidisciplinary panel subconsultants.

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- 1.7 Bidders will need to provide as part of their ITT submission a comprehensive programme that identifies tasks and shows how they will meet the overall objectives of undertaking the required technical due diligence and submitting and securing approval of any amendment/condition discharge applications in a timely manner and for the first RMA to be submitted and validated no later than 26 September 2024, in order to safeguard the extant outline planning permission. Expectations are that the RMA will be submitted suitably in advance of this date.

2. Delivery strategy

- 2.1 The current disposal strategy is to dispose of the site to one developer via a Building Lease. The link road is to be delivered by the developer.

NB this strategy is provisional and may change as the project progresses.

3. High level objectives

- 3.1 Homes England is seeking to appoint a professional services team from the Multi-disciplinary panel to assist with the projects key objectives as follows:
- To maximise the value and housing potential of the site, consistent with local planning policy and good urban design principles;
 - To maintain the status of the extant planning permission beyond 26 September 2024
 - To prepare relevant applications to discharge conditions and/or amend the outline planning permission to facilitate a proportionate RMA submission package
 - To prepare relevant supporting documents/support legal team in the preparation and determination of a Deed of Variation to facilitate a proportionate RMA submission package
 - To prepare relevant supporting documents for an RMA for the proposed visitor car parking area and associated works.
 - Secure approval of the reserved matters application.
 - Provide factual data inclusive of geotechnical parameters and contamination/land quality data which will form part of the marketing pack.

4. Planning Overview

- 4.1 The site forms part of an allocated site under Policy CP10 of the Dover District Core Strategy 2010 for about 500 homes, which also includes the neighbouring Officers Mess and Fort Burgoyne.
- 4.2 An outline planning application (19/00447) was validated on 9 April 2019 with all matters reserved except site access and for the erection of up to 300 dwellings, associated internal access, parking, road/footway/cycleway provision, open space, landscaping, surface water drainage, ancillary works (engineering works concerning movement of aggregate) and detailed matter of highway junction works.
- 4.3 Outline planning permission was granted on 27 September 2021 subject to 43 conditions and a S106 agreement. The decision notice, S106 agreement and support documents can be viewed on Dover District Council's website.
- 4.4 Amongst the conditions and S106 agreement, the outline permission secured/requires:
- The submission of the first reserved matters application within 3 years of the date of the permission; by 26 September 2024 (condition 5)

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- A phasing plan under condition 2 as shown in Figure 2 below.
- Requirement for provision of 50 visitor car parking spaces and entrance to the front of Fort Burgoyne to serve the future Fort uses (condition 9)
- Requirement for submission of a number of documents/plans with the first (or each) reserved matters application (see Decision Notice)
- Requirement for submission of a viability reassessment with each reserved matters application (see S106 agreement)
- A new Link Road, including bus route, connecting Dover Road to the A258. Phase 1 to be served from Dover Road and Phases 2 and 3 to be accessed from the new Link Road.
- Footpath connection across to the training/playing fields to the north east of the site.



Figure 2: Illustrative Phasing Plan

- 4.5 No discharge of condition or reserved matters applications have been submitted to date.
- 4.6 Dover District Council commenced preparation of a new Local Plan, which was submitted for Examination on 31 March 2023. The site is not taken forward as an allocation within the emerging Local Plan but is proposed to be located within settlement boundaries.

5. Technical Constraints and Considerations

- 5.1 Connaught Barracks Main Site as shown on Figure 1 above is located within the district of Dover, within the county of Kent. The site extends to 10.9ha.
- 5.2 The original barracks was constructed on open ground in c.1908. Further phases of development occurred in the 1930s and 1950s. Original buildings were replaced in the 1960s. The site was vacated by the military in 2006 and buildings were demolished during 2016. Localised post demolition remediation included buried tank removal and on-site processing and stockpiling of demolition materials. Referring to post demolition condition / validation reports, asbestos containing materials (ACM) remain in some of the stockpiles.

Access

- 5.3 The main access point is the double vehicle gates along Dover Road which open onto Fort Burgoyne Road - a private trafficked road providing access to Fort Burgoyne immediately to the north of the site. Remnants of the access roads lead from Fort Burgoyne Road into the main area of the former barracks.
- 5.4 The outline planning permission secured approval for a new Link Road that shall include Bus Rapid Transit services (to be subject to future reserved matters applications) that will serve Phases 2 and 3 of the development and in the long term the visitor car parking. Phase 1, and no more than 115 dwellings, is proposed to be served from Dover Road.
- 5.5 The access to the visitor car parking will need to be considered within any reserved matters application, including consideration of potential for any interim access to the visitor car parking from Dover Road and Fort Burgoyne Road prior to the delivery of the Link Road, if the car parking were to be delivered earlier in the project programme.
- 5.6 Conditions are attached to the outline planning permission that require a programme of works and timetable to be submitted that would keep Dover Road available as an unimpeded route for Bus Rapid Transit (BRT) until the link road has been constructed and is operational – including the junction on the A258.

Site Description

- 5.7 Circa 60% of the site comprises undulating landscaped ground and includes rows of mature trees. The east boundary of the site is densely vegetated with a c.3m high hedgerow and mature deciduous trees.
- 5.8 Circa 30% of the site comprises open ground which was surfaced with loose coarse gravel (processed demolition rubble) in the areas of demolished buildings. This material was unbound, often loose underfoot and is stockpiled to c. 5m high piles at several locations.
- 5.9 The remaining circa 10% of the site comprised the asphalt (bitumen bound) wearing course of the former internal access roads, including Fort Burgoyne Road, the central circle, and the former parade ground in the north, which measures c.160m (east to west) and 40m (north to south). The section of track leads east from the parade ground and connects with a closed and bunded access gate leading on to the A255.
- 5.10 Conditions are attached to the outline planning permission that require a remediation strategy to be submitted and approved and a verification report demonstrating the completion of works set out in the approved remediation strategy.

Topography

- 5.11 The site slopes from a level of c.103.5m AOD in the SE east to c.120.5 in the NW extremity. The climb is accommodated by shallow benched landscaping and a steeper slope in the NW corner of the site. E to W trending benching slopes were noted throughout the site, unfilled shallow archaeological excavations are present in the north.

Surrounds

- 5.12 The site is surrounded by a c.2.5m high mesh fence supported by concrete posts and topped with barbed wire. Beyond which land use in the surrounding area is summarised as follows:

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- 5.13 North Fort Burgoyne and associated ramparts is separated from the site by a c.10m wide concrete and flint revetted ditch which lies immediately north of the site beyond a row of mature trees.
- 5.14 East The A258 Road forms the east boundary with pastoral fields and a mature wooded area lying beyond.
- 5.15 South Dover Road and the A258 converge to the south of a small car park beyond the site's south boundary. Dover Castle and residential areas peripheral to Dover lie further to the southeast, where the land falls more steeply towards the coast and the river Dour. The Grade II listed Connaught Pumping Station lies circa 100m to the southwest. The former pumping station was constructed in 1854 and later museum originally housed a twin steam pump which was removed in 1954.
- 5.16 West Dover Road forms the west boundary and a recently constructed (in circa 2022) residential development lies on the former Officers Mess site on the west side of Dover Road.

Capacity

- 5.17 Planning permission was granted on 27th September 2021 for outline planning permission with all matters reserved, except site access, for the erection of up to 300 dwellings, associated internal access, parking, road/footway/cycleway provision, open space, landscaping, surface water drainage, ancillary works (engineering works concerning movement of aggregate), and the detailed matter of highway junction works.
- 5.18 The permission included the provision of 50 car parking spaces to serve neighbouring Fort Burgoyne.
- 5.19 11% affordable housing is secured by Section 106 agreement, subject to a viability re-assessment that under current wording is required to be submitted with each reserved matters application.

Phasing

- 5.20 An illustrative phasing plan has been secured on the outline planning application under condition 2, which also allows for an alternative phasing plan to be approved in writing with the local planning authority.
- 5.21 The illustrative phasing plan secures three phases: Phase 1 to be accessed from the Dover Road; Phases 2 and 3 shall be accessed from the proposed link road that will connect the north of Dover Road to the A258.
- 5.22 The visitor car parking area is currently located within Phase 2.

Heritage

- 5.23 The parameter plans and illustrative masterplan for the site at outline planning permission stage evolved with sensitivity to its historic and natural landscape context while offering the opportunity deliver a unique neighbourhood. Fort Burgoyne and Dover Castle Scheduled Ancient Monuments are both adjacent or close to the site and have historic connections to the site. The site is further within close proximity to the Kent Downs AONB (to the south of the A258).
- 5.24 Consideration of the individual design elements and relationship of the visitor car parking to the surrounding context will be key to the ultimate success of the development, such that derivative proposals are unlikely to do justice to the site or its surroundings. Indeed, Connaught Barracks has from the beginning been envisaged as providing an exemplar to the Dover housing market.

Ecology

- 5.25 The outline permission requires the submission of updated ecological surveys with any reserved matters application. The site is also within proximity of the Kingsdown Cliffs Special Area of Conservation.
- 5.26 Please note, the ecological surveys will be commissioned separately outside of this tender process. As such, ecological services are not required.

6. Risk summary

- 6.1 With regard to Part 1: refer to the Ground Investigation Specification for full details. The following have been identified as some of the key risks:
- **Contamination** - Historic investigations have identified localised occurrence of Asbestos fibres, elevated heavy metals, and hydrocarbons within the Made Ground. This asbestos concentration was minor and local occurrence have been removed, site investigations should therefore be classified as a non-notifiable non licenced work. Residual risk of acute local ground contamination remains, and the Contractor will be required to immediately report any visual or olfactory evidence of contamination to the investigation supervisor prior to review of the SIGS category.
 - **UXO** - A detailed UXO risk assessment has identified risk zones of Low to Moderate and Moderate (see Figure SK-0002, Annex 2 of the Ground Investigation Specification). Any observed feature that is not referred to in the Data Review and Desk Based Assessment (e.g. including but not limited to, buried archaeology, old foundations, protected species, invasive plants and free phase contaminants) should be advised to the Investigation Supervisor by the Contractor.
 - **Services** - The Contractor is to undertake their own service search and utility checks and will be responsible for identifying and locating any buried services in the investigation locations. Refer to S1.8.5 of the Ground Investigation Specification.
 - **Ecology** - No protected species have been identified on site. The contractor will be made aware of any restricted areas prior to the start of works and will be asked to liaise and coordinate the work with the appointed Ecologist.
 - **Archaeology** - Archaeological surveys may be undertaken by others in parallel with the GI, this may include an archaeological watching brief at specific exploratory hole locations.
 - **Site Security** - The site is not accessible by the public; however access will be shared with Fort Burgoyne workers using Fort Burgoyne Road. The Contractor shall agree working areas, access routes and storage areas (for plant, equipment and materials on site during the day and overnight) with the Employer in advance of the works. A secure working compound will be erected by the Contractor.
 - **Traffic Management** - Fort Burgoyne Road cannot be obstructed during the investigations.
- 6.2 With regard to Part 2: the key risks are:
- Project programme requires submission of an RMA no later than 26 September 2024.
 - The LPA refusing amendments the outline planning permission, affecting the scope of submission requirements and programme for submission of RMA.
 - LPA resource availability and expediency of stakeholder responses through pre-application and in determining any S73/S96a applications affecting programme for submission of RMA.
 - Policy changes and requirements of statutory stakeholders affecting the scope of any RMA.

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- Sensitive design and place-making required in context of Fort Burgoyne SAMM and Dover Castle, as well as Kent Downs AONB.
- Suitability of access from Dover Road prior to construction of the Link Road.
- Application scope to consider relationship with wider site objectives to deliver homes, and maintain flexibility for creating a high quality place within the wider site e.g. considering how BNG, ecological mitigation, drainage strategy may affect wider placemaking on the Main Site.

7. Stakeholders

7.1 Key stakeholders that we anticipate will need to be engaged with during the course of this commission include, not exclusively:

- Dover District Council Planning Department and consultees
- Kent County Council
- Historic England
- Natural England / AONB Board
- MP, Ward Councillors, Parish Councillors and community (proportionate to scope of application)
- The Land Trust (landowner of Fort Burgoyne)

B CONSULTANT BRIEF

1. The Services

- 1.1 One of Homes England's objectives is to accelerate the delivery of homes on this site and the selected bidder will need to drive the project forward.
- 1.2 The scope of this appointment will include two streams of work;
 - Part 1: Technical Due Diligence (site wide)
 - Part 2: Preparation of Reserved Matters application (RMA) and supporting amendments and/or condition discharge applications to outline planning permission (Visitor Car Parking and entrance area)
- 1.3 The services for each Part are set out further below.

Part 1: Technical Due Diligence (site wide)

- 1.4 The scope of the proposed site investigation is intended to complement existing information to improve coverage and understanding of the ground conditions for foundation and pavement design, soakaways and earthworks, and includes the identification of any ground contamination on the site to inform the development of mitigation / remedial options which may be required. Please refer to the **Ground Investigation Specification (Issue V1) and Bill of Quantities** annexed to this Brief. (Annex 1)

Part 2: Preparation of Reserved Matters application and supporting amendments and/or condition discharge applications to outline planning permission (Visitor Car Parking and entrance area)

- 1.5 It is the intention of Homes England to bring forward the first RMA for submission to Dover District Council prior to 26 September 2024. The RMA will comprise the visitor car parking and entrance area for Fort Burgoyne located within the north east of the site, together with any associated works required.
- 1.6 An extract of the illustrative masterplan supporting the outline planning permission is shown in Figure 3 below, showing the location of the proposed visitor car park.



Figure 3: Extract of illustrative masterplan to show location of visitor car parking (* = car parking on parcel plan)

- 1.7 The RMA site boundary will be subject to discussion with the Local Planning Authority, statutory stakeholders and subject to requirements relating to access and ecological mitigation. The intention is that the site boundary shall be the minimum possible to secure approval for the visitor car parking and Fort Burgoyne entrance areas.
- 1.8 Subject to technical advice and engagement with Kent County Council, access is anticipated to be taken temporarily from Fort Burgoyne Road and Dover Road, until such as time as the Link Road becomes operational. By way of background, the intention at Outline Planning Permission stage was to create an informal car park area with sealed gravel or a bound gravel surface with the car park spaces laid out in such a way as to retain the trees. A natural character to the car parking area is proposed to create a sympathetic layout which respects the setting of the Scheduled Monument and ecology (one of the trees is noted for bats), using techniques such as timber sleepers to denote the edges of parking areas with timber inlays marking the bays. The access could be combined with any pedestrian route (separated) but using the same materials.
- 1.9 The proposed RMA in relation to the car park will need to include any related works for example, but not limited to, access, drainage and ecological mitigation, and also the entrance area to Fort Burgoyne that sits between the two car parking areas.
- 1.10 In preparation of the RMA, consideration will also need be given to the upgrading of the pedestrian connection shown by a green arrow on Figure 2 to a vehicular access up to the boundary of the site, to safeguard for the event The Land Trust seek additional car parking in the land to the north east of the site. The suitability of this vehicular access link will be discussed with The Land Trust and Dover District Council in pre-application discussions.
- 1.11 Any RMA would require proportionate engagement with The Land Trust as the owner of Fort Burgoyne, relevant statutory stakeholders (including but not limited to Historic England and Dover District Council/Kent County Council technical consultees), the Local Planning Authority, the MP, Ward

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and Parish Councillors and the community. Please include a recommended, proportionate, engagement approach with the relevant stakeholders and community within any submission.

- 1.12 It will be necessary that the level of detail and information required to support the proposed RMA is proportionate to its scope. As such, amendments to the conditions and obligations on the outline permission will likely be required (via either deed of variation, discharge of condition, S96A and/or S73 applications). Following initial informal discussions with the Local Planning Authority, the following conditions/obligations have been identified to potentially require amendment/discharge:

Condition/obligation	Indicative amendment
Condition 2: Phasing Plan	Revise phasing plan to extract proposed RMA from Phase 2 (e.g. Phase '0').
Condition 4: Details of Reserved Matters	Revise condition to require proportionate submission package for proposed 'Phase 0' RMA
Condition 8: Design Code	Revise to remove requirement to submit Design Code with the proposed 'Phase 0' RMA.
Condition 9: Requirements for submission	Revise condition to reflect revised phasing strategy and identify relevant submission documents for proposed RMA.
Condition 13: Site Wide Open Space Strategy	Revise condition to require proportionate submission package for proposed 'Phase 0' RMA.
Condition 18: Ecological Mitigation and Management Plan	Revise condition to reflect proportionate submission for proposed 'Phase 0' RMA. Please note the RMA is likely to be implemented by a development partner; TBC during preparation of application. Therefore, undesirable to define management/maintenance strategy for the RMA at this stage.
Condition 29: Link Road access	Depending on agreed approach to Condition 2; may require amended wording.
Section 106 Agreement: Schedule 2 Part 2, para 1.1	Deed of Variation or written agreement that Viability Re-assessment not required with proposed RMA.

- 1.13 As part of any tender response, please review the Decision Notice and Section 106 agreement to set out your recommended strategy for any amendments or discharge of conditions and obligations required to achieve a proportionate submission package for the proposed RMA; including type of application.
- 1.14 Please also advise if you consider any other conditions would require amending in addition to those identified above, and why.

2. Indicative Programme

- 2.1 Bidders will need to provide as part of their submission a comprehensive programme that identifies tasks, timescales/dates of how they will meet these time critical milestone. The following indicative Key Milestones should be used as the basis for creating a comprehensive programme. If required, your submission should identify risks to achieving the below milestones and provide a programme which is considered to meet all the key deliverables.

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2.2 If you consider alternative dates to the key milestones are appropriate, please advise within your tender submission.

Key Delivery Milestones	Anticipated Date
<i>Previous stages</i>	
Issue of Expression of Interest	26 June 2023
Return of EOI	3 July 2023
Issue of Sifting Brief	5 July 2023
Return of Sifting Brief	19 July 2023
Notification of Sifting Outcome	31 July 2023
<i>Current and future stages</i>	
Issue ITT	2 August 2023
Return of ITT	8 September 2023 5pm
Evaluation of ITT Completed	15 September 2023
Notification of Preferred Bidder (assuming no Interviews)	19 September 2023
Standstill Letters End (10 days)	29 September 2023
Appointment of Multi-Disciplinary Consultant Team	2 October 2023
Meeting on site prior to commencement of Ground Investigation Works	Week commencing 2 October 2023
Digital Draft Ground Investigation Report submitted	No later than 4 weeks after completion of the ground investigation fieldworks (monitoring rounds may be outstanding).
Investigation Supervisor's comments on the draft Ground Investigation Report and associated digital data.	To be issued within 2 weeks from receipt of the draft report.
Supplementary report containing post fieldwork monitoring data to be submitted in draft for approval by the Investigation Supervisor. On approval the Contractor must then issue the report to the Investigation Supervisor in digital format and a signed hard copy issued to Homes England.	To be issued no later than 2 weeks after the completion of the final monitoring visit.
Latest determination of all amendment/discharge of condition applications (as required)	As early as possible, but no later than 01.08.2024
Latest submission of Reserved Matters Application	As early as possible, but no later than 01.09.2024
Determination of Reserved Matters Application	Assume 4 months determination period

3. The deliverables

A. Project and Cost Management Services

1. Lead consultant shall be responsible for the management and co-ordination of the multidisciplinary team of consultants to manage inputs and deliverables across the project including sub-consultants while undertaking Part 1: Technical Due Diligence work, and Part 2: RMA and amendment/discharge of condition applications up to a decision being made.
2. Project management meetings/updates for the Part 1 work will be held with the first meeting to be held on site prior to site set-up. Further meetings can be arranged during the duration of the works if required and to discuss the outcome of the investigations before submission of the final report.
3. Part 2 project management service for progress of planning applications, to include attending team meetings with Homes England every other week to provide details of the project, discuss issues and decisions that need to be reached. Preparation and distribution of agendas, minutes, programme, risk register, issues, and action logs at all stages of the project and reported back regularly at team meetings.
4. To prepare, monitor and update a Project Execution Plan (PEP) setting out the project and programme objectives, framework, governance, and management practices.
5. The bid should also include a risk assessment of tasks, timescales and meeting the critical objectives that will be reported on weekly, in written form.

B. Part 1: Technical Due Diligence Services

6. Please refer to the **Ground Investigation Specification (Issue V1) and Bill of Quantities** (Annex 1)

C. Part 2: Planning and Technical Services

7. Work with Homes England and provide town planning services to prepare, submit and determine amendment/discharge applications to the outline planning permission, and to prepare, submit and determine a RMA. The RMA should be market facing and consistent with local and national planning policy and good design principles. The RMA should minimise impact on the flexibility of designing and delivering the wider residential development site.
8. Review all documentation supporting the outline planning permission and clarify understanding/advise whether the strategy for the RMA is robust. Include preparation of a detailed planning strategy and programme to meet or improve upon the key milestones as set out above under paragraph B2.2.
9. Work with the Local Planning Authority to negotiate a Planning Performance Agreement (if required).
10. Work with the Local Planning Authority and relevant stakeholders through pre-application discussions to determine the scope of any amendment or discharge of condition applications required to facilitate a proportionate RMA submission package.

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11. Preparation, submission and validation of up to 7 x Section 73 applications to amend conditions identified in paragraph B1.12. To include (not exclusively), covering letter, application form and any anticipated revised plans/supporting documents (including updated phasing plan). *Please note it is expected that multiple conditions could be amended under one application and/or that Section 96a applications may be acceptable in some cases. For the purposes of pricing, however, please assume 7 separate Section 73 applications; 1 per condition requiring amendment as per B1.11.*
12. Work with Homes England, Local Planning Authority and other key stakeholders during consideration of the amendment applications (following submission and validation) to deal with matters arising and to reach a positive decision.
13. Provide support to any appointed legal team on the preparation of a Deed of Variation.
14. Work with Homes England to support discussions with relevant third parties to confirm access arrangements for proposed car parking area, if delivered ahead of the Link Road.
15. Work with Homes England to prepare a detailed layout for the visitor car parking and Fort Burgoyne entrance area, taking consideration of technical input and feedback from the Local Planning Authority, statutory stakeholders, The Land Trust and the community.
16. Work with the Local Planning Authority and relevant stakeholders through pre-application discussions to reach submission of a valid RMA.
17. Preparation of all drawings required including, for example (please note and price for separately within any tender response any additional plans you anticipate to be required)
 - Block Plan (condition 4);
 - Existing and Proposed Elevations;
 - Existing and Proposed Floor Plans;
 - Existing and Proposed Cross/Section Drawings
 - Highways drawings where relevant (condition 4);
 - Site location plan (condition 4);
 - Landscaping details and planting plans including schedule of plants (condition 4 and 9);
 - Lighting Plan (condition 8);
 - Boundary treatments (condition 4);
 - Details of improved public access (condition 9);
18. Preparation of all technical reports including, for example (please note and price for separately within any tender response any additional reports you anticipate to be required):
 - Application forms and notices;
 - Planning Statement;
 - Statement of Community Involvement (may be within Planning Statement)
 - Design and Access Statement;
 - Principles of designing out crime Statement (condition 4);
 - Statement to satisfy condition 8 if required by LPA
 - Earthworks Statement (condition 4);
 - Arboricultural Plans and Reports
 - SuDS strategy (condition 4, condition 21 and 22);
 - Surface Water Drainage Scheme (condition 23)
 - Sustainable construction methods Statement (condition 4);

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- Transport Assessment and access arrangement (condition 4; assume temporary use of Fort Burgoyne road)
- Site-specific geology report
- Utilities Report, as necessary
- Heritage Report
- Ecological Reports and Biodiversity Net Gain Assessments, if required (**see note below**)
- Habitat Regulations Assessment
- Compliance with Environmental Statement

Please note: The following ecological studies have been commissioned and are under progress in summer 2023 and therefore would not be required:

- A desk study for the area 2km of the site to determine the presence of statutory/non-statutory nature conservation sites (10km for internationally designated sites) and records of protected and notable species.
- UKHab Classification Survey undertaken in accordance with the UK Habitat Classification Professional Edition v1.1.
- Within the area proposed for the RMA, ground level roost assessments of trees for bats and habitat condition assessments to inform future Biodiversity Net Gain assessments.
- Report covering the indicative RMA area, comprising site description, methodologies used, desk study results and results of the UKHab survey including map of habitats and target notes and recommendations for further ecological surveys if required and potential mitigation.

19. Work with Local Planning Authority and other key stakeholders during consideration of the planning application (following submission and validation) to deal with matters arising and to reach a positive decision.

20. Secure reserved matters consent for the visitor car parking and entrance area to Fort Burgoyne, including associated works, including negotiation of any conditions and obligations required to be imposed.

D. Community Engagement and Social Value Services

In carrying out engagement on behalf of Homes England, the consultant will also need to comply with data protection requirements (General Data Protection Regulation (GDPR) 2016) and address matters relating to equality, diversity and inclusion in the approach to consultation and materials produced (legal requirements are set out in Government's Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018), as well as meeting Homes England's branding guidelines.

21. An Engagement Strategy should be prepared and should include mapping of key stakeholders and the proposed strategy to meaningfully engage all relevant parties proportionately to inform the detailed design for the visitor car parking and entrance area to Fort Burgoyne. This will be further developed and refined by the Homes England Project Team and Community Engagement Team with the successful bidder.

22. Proportionate engagement is anticipated to be required with the Land Trust as the owner of Fort Burgoyne, the MP, Ward and Parish Councillors and the community up to submission of the RMA application.

E. Other Deliverables

23. Outline and provide a price for any other deliverables you feel necessary to deliver the commission.

Bidders will need to provide as part of their ITT submission a comprehensive programme that identifies tasks and shows how they will meet the overall objectives of undertaking the Part 1 and Part 2 services against the key milestones set out in paragraph B2.2.

F. Construction, Design, and Management and Health & Safety Services

Homes England takes health and safety very seriously and expects all Suppliers to do the same. All Suppliers must adhere to the Health and Safety obligations in the Framework Contract and the following Homes England policies where applicable:

- Homes England Safety, Health and Environment Policy
- Homes England Asbestos Policy
- Homes England CDM Policy

Principal Designer role

24. The consultant will perform the duties and responsibilities of Principal Designer as specified in the Construction (Design and Management) Regulations 2015, in particular, Regulation 8 – General Duties; Regulation 11 Duties of a Principal Designer in relation to health and safety at the pre-construction phase, and Regulation 12 Construction phase plan and health and safety file, for the following stages:-
- a. Site planning and Enabling Stage (RIBA Stage 1 to 2)** Oversee the master-planning, urban and landscape design or any other design in support of the reserved matters planning application (Part 2 of this commission)
 - b. Technical Due Diligence (site wide)** intrusive site surveys and including any other planning or preparation for construction work required in support of completing site surveys. (Part 1 of this commission)

25. Seek the cooperation of and cooperate with other duty holders, this includes Homes England project managers, master-planners, designers, the CDM Adviser (CDMA), site agents and the Principal Contractor involved in the project so far as necessary to enable them all to perform their duties.

Principal Contractor role

26. As the site investigation works are considered construction work, the consultant will also undertake the role as Principal Contractor and perform the duties and responsibilities of Principal Contractor as defined in the Construction (Design and Management) Regulations 2015 for the technical due diligence works only (Part 1 of this commission)

4. Other consultants being used/procured

- 4.1 Please note the scope of works required for ecological services; initial survey work has been commissioned as set out under section B3 The Deliverables.

5. Meeting and reporting requirements

- 5.1 Part 1 of the commission will be managed day-to-day by Homes England's Senior Managers in the Disposals Team. The consultant team will need to work with various members of the Planning and Enabling, Disposals, Technical Services Teams, and others as required.
- 5.2 Part 2 of the commission will be managed day-to-day by Homes England's Senior Managers in the Planning and Enabling Team. The consultant team will need to work with various members of the Planning and Enabling, Consultation and Community Engagement, Disposals, Technical Services, and other Homes England teams as required.
- 5.3 Please see Section A.8 for Key Stakeholders that the supplier will need to engage with. Please note other stakeholders may need to be consulted.

Meeting Requirements

Inception meeting

- 5.4 It is anticipated that the inception meeting will be held w/c 9 October 2023 and should be attended by all key members of the appointed consultant team. This shall detail the aims, requirements and timescales for the project. Key milestones and delivery targets will be agreed at the inception stage with the appointment of the consultant and staged fee approvals will be made on the satisfactory completion of these milestones.

Review meetings

- 5.5 Review dates/break clauses will be incorporated into the appointment to ensure project requirements and client expectations are met. If required, these review points may be amended by Homes England.
- 5.6 At each review point the appointed consultant will be required to demonstrate how they have delivered against project requirements in line with forecast spend and the milestones and delivery targets that have been agreed with the successful consultant during inception.
- 5.7 Review meetings must include an agenda item to discuss the supplier's progress against the action plan and metrics committed to in response to the social value question set out in this instruction.

Poor Performance Meeting

- 5.8 These meetings will hopefully not be required. However, if poor performance is repeated following escalation to the Supplier's Key Personnel to resolve the issue, as required in the Framework Management Schedule of the Framework Contract, the Framework Manager must be notified and Homes England may call for a Poor Performance Meeting. Beforehand, Homes England will present areas of concern so that the Supplier and Homes England can discuss what happened and why, what will be done to prevent it happening again and how matters will improve. The Supplier subject to such

a meeting would be expected to outline in writing in a Rectification Plan afterwards what improvements/modifications they will be putting in place. There will be a maximum of two Poor Performance Meetings before termination of the commission.

C CONTRACT MATTERS

1. Payment

- 1.1 A Resource and Pricing Schedule will be required, and it is anticipated that fees will be paid on satisfactory completion of specific milestones/tasks/packs of work. The following gives an example of how this is anticipated to work - bidders are expected to break down each element of the Key Deliverables into a specific Milestone/Task/Pack of Work including team members and fixed fees: This is to ensure that both quality and timescales are maintained at all times.
- 1.2 Fees will be paid monthly.

2. Collateral Warranty

- 2.1 The site will be disposed of in phases and multiple Collateral Warranties may be required.
- 2.2 There will not be any opportunity to amend the provisions of the Collateral Warranty documentation.

3. Termination

- 3.1 Should performance during the period of this appointment prove unsatisfactory following the Poor Performance meeting provisions set out in the Management section above, Homes England will exercise its right under the Termination and Suspension of the Contract clause in the Framework Contract to give notice to terminate the arrangement with immediate effect.
- 3.2 If the services are no longer required, for whatever reason, then Homes England reserves the right to terminate the appointment and pay for services completed at that point.

Part 2 - Instructions for Submitting a Response

1. General

- 1.1 Please refer to the ProContract Portal Advert for the Further Competition deadline. Tender responses **must** be submitted on ProContract. Please regularly check ProContract for any amendments to the Further Competition deadline. For all ProContract portal issues please contact ProContractSuppliers@proactis.com.
- 1.2 Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
- 1.3 **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, Homes England. It is the Suppliers responsibility to check the ProContract website for any updates to the Procurement process. No claim on the grounds of lack of knowledge of the above mentioned item will be entertained.**
- 1.4 The Supplier must check the Further Competition ITT for obvious errors and missing information. Should any such errors or omissions be discovered the Supplier must send a message via the messaging function on ProContract. No alteration may be made to any of the documents attached thereto without the written authorisation of Homes England. If any alterations are made, or if these instructions are not fully complied with, the tender response may be rejected.
- 1.5 All clarification requests must be sent using ProContract no later than 5 working days before the Further Competition deadline shown on ProContract. Any queries submitted after this may not be answered. Homes England will respond to clarifications as soon as practicable.
- 1.6 Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England. Homes England will consider any such request and will either respond on a confidential basis or give the Supplier the right to withdraw the clarification question. If the Supplier does not elect to withdraw the question and Homes England considers any clarification question to be of material significance, both the question and the answer will be communicated, in a suitably anonymous form, to all prospective Suppliers who have responded. If Suppliers consider that page limits set out in Section 20 (Evaluation Criteria) are insufficient to provide the information required by the question then a clarification request should be raised. No guarantee can be given that the page limit will be increased.
- 1.7 Tender responses must not be accompanied by statements that could be construed as rendering the tender response equivocal and/or placing it on a different footing from other Suppliers. Only tender responses submitted without qualification strictly in accordance with the Further Competition ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England's decision on whether or not a tender response is acceptable will be final.

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- 1.8 Tender responses must be written in English and both Microsoft and PDF versions of tender documents must be submitted.
- 1.9 Under no circumstances shall Homes England incur any liability in respect of this Further Competition or any supporting documentation. Homes England will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their tender response to this Further Competition.
- 1.10 Homes England reserves the right to cancel this Further Competition process at any time.

2. Conflict of Interest

- 2.1 Homes England will exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.
- 2.2 Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform Homes England, detailing the conflict in a separate Appendix.

3. Confidentiality

- 3.1 This Further Competition ITT and associated information is confidential and shall not be disclosed to any third party without the prior written consent of Homes England. Copyright in this Further Competition ITT is vested in Homes England and may not be reproduced, copied or stored on any medium without Homes England's prior written consent.
- 3.2 Suppliers shall not undertake, cause or permit to be undertaken at any time any publicity in respect of this Further Competition process in any media without the prior written consent of Homes England.

4. Quality

- 4.1 A Response Form template has been provided in Part 3 to respond to the Quality questions detailed in Section 8. The Response Form must be **completed and returned** as part of the tender response.
- 4.2 Quality will account for **60%** of the overall score.
- 4.3 Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 3. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

5. Pricing

- 5.1 A Resource and Pricing schedule has been provided with this Further Competition ITT which must be completed and returned as part of the tender response.
- 5.2 Pricing will account for **40%** of the overall score.

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- 5.3 The pricing approach for this Further Competition is a fixed fee based on the requirements identified within this scope. If you have identified additional scope/work as part of your tender response that was not anticipated as part of this original scope, please provide a fee proposal for those individual items within the Resource and Pricing Schedule.
- 5.4 The list of activities in the Resource and Pricing Schedule is not exhaustive and there may be additional duties/services required that will emerge as work is undertaken. This commission may be extended on client instruction to cover such matters as arise, based on a time charged fee schedule completed in the tender response. The commission will only be extended if the services relate to the original objective of the overall call off contract.
- 5.5 Suppliers are reminded that day rates for all individuals must be the agreed Framework Contract rates unless discounted rates are offered and will be used for all of the services.

6. Evaluation

- 6.1 Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to Homes England. The evaluation criteria (and relative weightings) that Homes England will use to determine the most economically advantageous Tender are set out in Section 20 (Evaluation Criteria) below and the scoring approach is detailed in Section 25 (Worked Example). Scores will be rounded to two decimal places.
- 6.2 Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.
- 6.3 Award decisions will be subject to the standstill period if over the FTS Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.
- 6.4 Interviews will not be required as part of this ITT process.

7. Documents to be returned

- 7.1 Suppliers are expected to provide the following information in response to this Further Competition ITT:
- Completed Response Form
 - Completed Resource and Pricing Schedule
 - Completed Bill of Quantities
 - Supporting CV's for staff proposed to undertake this commission (no more than 2 pages each)

8. Evaluation criteria

8.1 Scoring method

Quality will account for 60% of the Overall Score. The following scoring methodology will apply:

5 – Excellent Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

4 – Good Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

3 – Acceptable Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.

2 - Minor Reservations Some minor reservations of the Supplier's understanding and proposed methodology, with limited evidence to support the response.

1 – Major Reservations/Non-compliant Major reservations of the Supplier's understanding and proposed methodology, with little or no evidence to support the response.

0 - Unacceptable/Non-compliant Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.

PLEASE NOTE:

If your response scores 0 or 1 for any one question your overall submission will be deemed as a fail.

Any text beyond the specified page limits below will be ignored and will not be evaluated.

Homes England will not cross-reference to other answers when assessing quality responses.

Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.

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8.2 Quality Questions

Number	Criteria	Tender requirement	Weighting	A4 limit
1	Resourcing, management and communication	<p>Provision of:</p> <ul style="list-style-type: none"> • Details of who will be involved in the commission including sub-consultants supported by CVs for all proposed staff members. CVs should include details of specific projects each staff member has worked on that would support this project / are comparable to this project. CVs can be included as an appendix outside of the word limit. • Details of proposed time allocation of staff members to various elements of the scope and details of fees. Ensure clarity on who is leading on different thematic areas. • Task specific organogram for team structure • Inclusion of organograms from previous projects where the same team members have worked together, where relevant. • Provision of details of how the project team will be managed including the sub-team and how the sub-team contracting arrangements will be managed. • Provision of details of how the client relationship will be managed including regularity of meetings, management of meetings and client reporting. <p>Please confirm that the resourcing information provided at Sifting Brief stage still stands. If you wish to change any of the subconsultants or personnel, please note that this can only be done with the express consent of the Homes England Project Manager.</p>	5%	<p>3 pages</p> <p>Font: 12 point Calibri Light</p>
2	Programme and risk	<ul style="list-style-type: none"> • Please explain how each required discipline will deliver their scope of services during the course of this programme. • Demonstrate how you will ensure that proposals are technically deliverable and do not have internal conflicts, e.g. ecology, landscape and drainage proposals all work together. • Review the project brief and all due diligence information provided. 	20%	<p>5 pages in total - 3 pages for approach plus 2 pages for programme (which can be A3)</p>

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		<ul style="list-style-type: none"> • Explain where you see the key risks to programme and cost, and how you will mitigate these. These might include technical, planning, stakeholder or other risks. • Please include a detailed delivery programme based on the indicative programme provided in Part 1B of this Further Competition ITT showing key activities and dependencies. 		Font: 12 point Calibri Light
3	Part 1 and Part 2 Methodology	<p>Part 1: Please explain your understanding of the requirements for Part 1 Technical Due Diligence work and any opportunities or risks identified from that described within the project brief.</p> <p>Part 2: Please explain the planning strategy you propose to adopt to achieve the Part 2 objectives of the submission of a proportionate RMA in the timeframes set within this ITT, including any necessary amendment or discharge of condition applications, and provide a high level commentary on the planning policy environment (please do not list out the relevant policies) and how it may present opportunities or risks to the project as described in the project brief.</p>	25%	6 pages in total - 2 page for Part 1 and 4 pages for Part 2 Font: 12 point Calibri Light
4	Social value	<p>Please demonstrate how you will support the government’s Social Value commitment throughout delivery of this project.</p> <p>Your response should demonstrate how you will support the Model Assessment Criteria (MAC) below:</p> <p>MAC 4.1: Deliver additional environmental benefits in the performance of the contract including working towards net zero greenhouse gas emissions.</p> <p>For the Model Assessment Criterion, please include in your response:</p> <p>- Your ‘Method Statement’ stating how you will achieve the Model Assessment Criteria</p>	10%	4 pages in total - 3 pages for approach plus 1 page for Action Plan Font: 12 point Calibri Light

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		<p>- A timed project plan and process, including how you will implement your commitment and by when. Also, how you will monitor, measure and report on your commitments/the impact of your proposals. You should include but not be limited to:</p> <ul style="list-style-type: none"> ○ timed action plan ○ use of metrics ○ tools/processes used to gather data ○ reporting ○ feedback and improvement ○ transparency <p>- How you will influence staff, suppliers, customers and communities through the delivery of the project to support the Policy Outcome.</p> <p>Please see Social-Value-Model-Edn-1.1-3-Dec-20.pdf (publishing.service.gov.uk) for more information on the Model Assessment Criteria</p>		
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Price will account for 40% of the Overall Score. The lowest price will gain the maximum marks with other prices expressed as a proportion of the best score using the maths explained in the worked example below.

Criteria	Demonstrated by	Weighting
Price	Completed Resource and Pricing Schedule, inc. completed Bill of Quantities	40%

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8.3 Worked example of weighting and scoring

How your quality scoring will be used to give a weighted score

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	3	5%	1	3	38
	2	4	20%	4	16	
	3	3	25%	5	15	
	4	2	10%	2	4	
Supplier B	1	5	5%	1	5	47
	2	4	20%	4	16	
	3	4	25%	5	20	
	4	3	10%	2	6	
Supplier C	1	2	5%	1	2	N/A (fail)*
	2	1	20%	4	N/A	
	3	2	25%	5	10	
	4	2	10%	2	4	

* in the example above Supplier C's pricing will not be scored

Worked example of how your price will be used to calculate a score

Bidder	Form of Tender price	Lowest price/Supplier's price (as %)	Price Score (out of 40)
Supplier A	350	$350/350 = 100\%$	$100\% * 40 = 40$
Supplier B	700	$350/700 = 50\%$	$50\% * 40 = 20$
Supplier C	250	N/A	N/A

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Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	38	40	78	1
Supplier B	47	20	67	2
Supplier C	N/A	N/A	N/A	N/A

Part 3 – Response Form

Framework:	Development and Regeneration Technical Services (DART) Framework
Project Title:	Connaught Barracks, Dover (Main Site)
ProContract Identification Number:	DN676474
Supplier:	[insert]
Date:	[insert]

To enable Homes England to evaluate your tender, we require Suppliers to respond to the questions below whilst making reference to the evaluation section above.

Please refer to the evaluation section for page limits for each question. Any text beyond this will be ignored and will not be evaluated.

1. Resourcing, Management and Communication

2. Programme and Risk

3. Part 1 and Part 2 Methodology

4. Social Value

Resource and Pricing Schedule

Excel spreadsheet to be embedded by Supplier in response.