

# **Invitation to Tender**

## **Evaluation Model and Questions**

**For the Procurement of:**

**Viability Appraisals of Planning  
Application Development Costs  
Submissions**

**&**

**Quantity Surveyor Advice on  
Development Costs Submitted in  
Association with Planning Applications**

**&**

**Engineer Advice on Development  
Proposals and Associated Costs in  
Association with Planning Applications**

**Tenderer .....**

**RETURN DATE FOR SUBMISSION  
Noon on 18 June 2021**

**Issued 11 May 2021**

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## **1.0 Introduction**

- 1.1 Lancaster City Council is seeking costed proposals and methodologies from suitably experienced and qualified Viability, Quantity Surveyor and Engineering consultants to undertake viability appraisals of financial data (development costs and development values) submitted with planning applications and to provide advice on the necessity for and costs associated with development, particularly abnormal and external works.
- 1.2 The consultants will provide the Council with independent advice which will be used when negotiating affordable housing provision and developer contributions, when determining planning applications and supporting the Council's position at appeal.
- 1.3 The Council is seeking to engage preferred consultants to undertake viability appraisals and to provide advice as and when the need arises. The contract will be for a three-year period, however, each item of work will be paid for on the satisfactory receipt of the completed item. The successful consultants will undertake viability appraisals and provide advice for all cases where necessary, unless a conflict of interest is identified.
- 1.4 Tenders can be submitted for the viability appraisals and abnormal/external/costs advice individually or in any combination. A separate tender must however be provided for each Lot. This will allow companies to tender for the elements of work they have the appropriate expertise for. Where companies with various expertise routinely work together a joint tender is invited.
- 1.5 Where conflicts of interest arise, an alternative consultant will be commissioned for that individual piece of work.

## **2.0 Spatial Context**

- 2.1 Lancaster is the most northerly district in Lancashire covering an area of approximately 565 square kilometres. It contains the coastal towns of Morecambe and Heysham, the historic City of Lancaster, the railway town of Carnforth and an extensive rural area including two Areas of Outstanding Natural Beauty (AONB) – the Arnsdale and Silverdale AONB and the Forest of Bowland AONB. The district is bounded to the south by the Lancashire authorities of Wyre and the Ribble Valley, to the east by the North Yorkshire authority of Craven and to the north by the Cumbrian authority of South Lakeland. The part of the district to the north east of Cowan Bridge is in the Yorkshire Dales National Park (YDNP). Planning responsibilities for this area are with the YDNP Authority.

## **3.0 Local Plan**

- 3.1 The Local Plan comprises of the following four separate adopted Local Plan documents:
  - Strategic Policies & Land Allocations DPD
  - Development Management DPD
  - Morecambe Area Action Plan DPD
  - Arnsdale and Silverdale AONB Plan DPD

- 3.2 The Council adopted the Local Plan: Strategic Policies and Land Allocations Development Plan Document (SPLADPD) and the Review of the Development Management Development Plan Document (DMDPD) on the 29<sup>th</sup> July 2020.
- 3.3 There are also two neighbourhood plans:
- Wennington Neighbourhood Plan
  - Wray-with-Botton Neighbourhood Plan
  - Several other neighbourhood plans are being prepared.
- 3.4 The adopted Local Plan focuses most of the development envisaged in sustainable locations to the north, east and south of the regional centre of Lancaster. Strategic housing sites have been allocated at East (policies SG7 & SG8)) and North (policies SG9 & SG10) Lancaster and on the edge of the market town of Carnforth (policy SG11), there are also a number of smaller housing allocations in sustainable rural settlements.
- 3.5 The plan also includes a number of regeneration and development opportunity sites such as the Canal Quarter (policy SG5) appropriate for mixed use development and employment sites.
- 3.6 The Local Plan includes policies which require the provision of affordable housing (policies DM3, DM6 and AS03), all new homes to meet NDSS and 20% to meet the Building Regulations M4(2) (policy DM2). Contributions are also routinely required for education places, open space and recreation (PAN04 – Open Space Provision in New Residential Development Planning Advisory Note) and off-site highway works.
- 3.7 Policies in the Local Plan identify a Broad Location for Growth in South Lancaster (policies SG1, SG2 and SG3), which will include the proposed Bailrigg Garden Village (BGV). The broad location for growth does not allocate land. The Council is currently drafting a Lancaster South Area Action Plan (AAP) which will allocate land for development, transport corridors, biodiversity and open space. The AAP will include policies specific to the AAP, such as affordable housing, a design code, biodiversity, open space, recreation and SuDS requirements. It is anticipated that requirements for enhanced energy efficiency and renewables will be included within the AAP. A Masterplan is currently being developed for BGV<sup>1</sup>. The introduction of a CIL is also likely to be introduced to support the provision of infrastructure such as the works to Junction 33, the Movement Strategy, Bus Rapid Transit, Cycle Superhighway<sup>2</sup>, education and health services.
- 3.8 On 30<sup>th</sup> January 2019, the Council declared a climate emergency. Whilst the newly adopted Local Plan does seek to address climate change, it was too far advanced in the plan preparation process to incorporate some of the actions and directions of the climate emergency declaration. We are therefore entering into an immediate Local Plan review to ensure that the aspects of this important agenda are adequately considered and include the necessary mitigation and adaption measures necessary to address the climate emergency.
- 3.9 The Review<sup>3</sup> has a specific remit to re-consider, amend and add to policies which can influence the Council's response to climate change. It will not reconsider site allocations, housing numbers or other principles within the adopted Local Plan.

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<sup>1</sup> [Bailrigg Garden Village Coming Soon](#)

<sup>2</sup> <https://www.lancashire.gov.uk/council/strategies-policies-plans/roads-parking-and-travel/major-transport-schemes/transforming-lancaster-travel/>

<sup>3</sup> <https://www.lancaster.gov.uk/planning/planning-policy/local-plan-review>

- 3.10 The Review will consider including additional policy requirements into the Local Plan such as enhanced energy efficiency measures, requirements for renewables, enhanced SuDS requirements, biodiversity enhancements and specific requirements for EV charging points (this matter is being progressed as an SPD prior to the adoption of the revised plan).
- 3.11 The Review and the AAP are subject to ambitious timetables with a proposed adoption dates of June 2022 and December 2022 respectively. The planning and contributions policies are therefore likely to alter during the course of this contract.
- 3.12 The Local Plan documents, SPDs, PANs and further information about the Local Plan Review can be found on the Council's website;  
[www.lancaster.gov.uk/about-local-plan](http://www.lancaster.gov.uk/about-local-plan)

## 4.0 Previous Viability Studies

- 4.1 The Local Plan is supported by the following viability evidence documents:
- Local Plan Viability Assessment (Stage One) (April 2018);
  - Local Plan Viability Assessment (Stage Two) (November 2018);
  - Arnsdale and Silverdale AONB DPD Viability Assessment (September 2017).
- 4.2 The Stage One Assessment provides, "a generic, formula based approach to assess the viability of an appropriate spectrum of representative types of sites within the District. .... The primary objective of this exercise is to provide an information base to enable the Council Officers to make broad brush assumptions on whether genres of sites are likely to be deliverable and to support the progression of the Local Plan towards the examination process."<sup>4</sup>
- 4.3 The Stage Two Assessment "involves more detailed analysis of proposed strategic sites .... to consider likely S106 contributions, a possible Community Infrastructure Levy (CIL) and test the extent of affordable housing which can be viably delivered within residential schemes"<sup>5</sup>.
- 4.4 The Arnsdale and Silverdale AONB Viability Assessment (AONBVA) was jointly commissioned with South Lakeland District Council to assess the viability of policies within the DPD. These policies are specific to the Arnsdale and Silverdale AONB.
- 4.5 The Stage One and Two Viability Assessments, and for the AONB Viability Assessment can be found on the Council's website:  
<http://planningdocs.lancaster.gov.uk/AniteIM.Websearch/Results.aspx>  
The AONBVA can be found on the Council website:  
<http://www.lancaster.gov.uk/planning/planning-policy/arnside-and-silverdale-aonb-dpd>  
(Previous Stages, Examination documents)
- 4.6 It should be noted that Local Plan Viability Assessments were carried out prior to the changes in the NPPF (2019), Planning Practice Guidance and the RICS Financial viability: conduct and reporting 1<sup>st</sup> Edition (May 2019). Amendments to the assumptions made are expected in accordance with the revised policy and guidance and up to sources and date evidence.
- 4.7 Viability Assessments have been commissioned for the Local Plan Review and the AAP.

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<sup>4</sup> Local Plan Viability Assessment (Stage One) (April 2018)

<sup>5</sup> Local Plan Viability Assessment (Stage One) (April 2018)

## 5.0 Scope

- 5.1 The project consists of three Lots:
1. The preparation of site specific Viability Assessment Reports, including viability appraisals of financial data (development costs and development values) submitted with planning applications, and to provide advice to the Council about the range/amount of affordable housing and viable range of contributions which can be delivered.
  2. Assessment and advice with regard to development costs, in particular costs associated with abnormal development costs and external development costs.
  3. Assessment and advice with regard to the necessity for and extent of abnormal and external works
- 5.2 Methodologies and costs must be provided for each Lot separately. Companies may submit tenders for any combination of Lots. Where companies with various expertise routinely work together joint tenders are invited.

## 6.0 Lot 1

### Viability Assessment of financial data (development costs and development values) submitted with planning applications

- The preparation of site specific Viability Assessment Reports, including viability appraisals of financial data submitted with planning applications, and to provide advice to the Council about the range/amount of affordable housing and contributions which can be viably delivered.

#### Requirements/Outputs

- a. The provision of site specific Viability Appraisals, including sensitively testing, of the financial data submitted with planning applications to determine the viable range/amount of affordable housing and other planning policy contributions which delivered.
- b. The provision of site specific Viability Assessment Reports to include:
  - All necessary supporting evidence and sources for the assumptions used to determine the appropriate development values and costs and the recommendations made;
  - A written critique of the developers/applicants submitted financial data / Viability Appraisal / Viability Assessment;
  - An overall recommendation on the viable range of affordable housing and other planning policy contributions which can be viably delivered.
- c. Liaison with the Council and applicants/developers to discuss and support the outcomes of the Viability Appraisals and Assessment Reports.
- d. The provision of rebuttal evidence following responses from applicants/developers to the Viability Assessment/Appraisals.
- e. The Council will expect the consultant to be available to appear and provide expert evidence at appeal, either at Informal Hearings or Public Inquiries, should applications be refused on the basis of the Viability Assessment/Appraisals produced.

- f. The Viability Appraisals and Report shall accord the NPPF (2019), the Planning Practice Guidance for viability (updated September 2019) and the RICS Financial viability: conduct and reporting 1<sup>st</sup> Edition (May 2019) or any future updates.
- g. The methodology to be applied is largely a matter for the consultants to determine and the Council does not wish to prejudice solutions. However, the approach to land valuation, must take into account infrastructure and policy requirements as required by NPPF (2019), Planning Practice Guidance and the RICS Financial viability: conduct and reporting 1<sup>st</sup> Edition (May 2019).
- h. The Viability Appraisals and Viability Assessment Report must be able to withstand examination in public and close scrutiny by all interested parties. The methodology proposed and the supporting justification must be set out in the tender response.

## 7.0 Lot 2

### Assessment and advice with regard to development costs, in particular costs associated with abnormal development costs and external development costs

#### 7.1 The scope includes:

- The calculation of development costs, in particular those associated with abnormal and external development costs, based upon the details submitted with planning applications, the appraisal of development costs submitted by applicants/developers and the preparation of written reports and advice.

#### Requirements/Outputs

- a. Calculation of and provision of written costings, in particular those associated with abnormal and external costs, associated with development based upon the technical information submitted with planning applications (e.g. SuDs schemes, foundation costs, material costs etc.).
- b. The appraisal of development costs, in particular those associated with abnormal and external costs, submitted by an applicant/developer and the provision of a written critique of the submitted costs.
- c. The provision and written explanation of all necessary supporting evidence and sources for the assumptions used to determine the appropriate development costs and the recommendations made at a and b.
- d. Liaison with the Council and applicants/developers to discuss and support the outcomes of the cost calculation and appraisal.
- e. The provision of rebuttal evidence following responses from to outputs of a to d.
- f. The Council will expect the consultant to be available to appear and provide expert evidence at appeal, either at Informal Hearings or Public Inquiries, should applications be refused on the basis of the advice provided.
- g. The methodology to be applied is largely a matter for the consultants to determine and the Council does not wish to prejudice solutions but the calculations and appraisals shall accord the most update RICS guidance.
- h. The calculation and appraisals must be able to withstand examination in public and close scrutiny by all interested parties. The methodology proposed and the supporting justification must be set out in the tender response.

## 8.0 Lot 3

### Assessment and advice with regard to the necessity for and extent of abnormal and external works (e.g. specific foundations, SuDS)

8.1 The scope includes:

- The assessment of necessity for and extent of proposed construction work, in particularly those associated with abnormal and external works to determine the most cost effective measures available.
- a. The assessment and provision of written critique of the necessity for and extent of proposed external and abnormal works. The assessment required will differ in each individual scheme, depending upon the works proposed, e.g. proposals for piling of foundations may require assessment to determine whether they are necessary across the whole of a site or if they could be confined to a specific part of the site alternatively the assessment of a drainage scheme may be required.
- b. The provision and written explanation of all necessary supporting evidence and sources for the assumptions used to determine the appropriate development costs and the recommendations made at a and b.
- c. Liaison with the Council and applicants/developers to discuss and support the outcomes of the assessment of construction work.
- d. The provision of rebuttal evidence following responses from to outputs of a to c.
- e. The Council will expect the consultant to be available to appear and provide expert evidence at appeal, either at Informal Hearings or Public Inquiries, should applications be refused on the basis of the advice provided.
- f. The methodology to be applied is largely a matter for the consultants to determine and the Council does not wish to prejudice solutions.
- g. The calculation and appraisals must be able to withstand examination in public and close scrutiny by all interested parties. The methodology proposed and the supporting justification must be set out in the tender response.

## 9.0 Draft Timetable

6.20 The dates given below are indicative and may be subject to change.

<b>Target Dates</b>	<b>Activity</b>
11 May 2021	Issue Invitation to Tender documents
Noon 18 June 2021	Return of tender documents
1 & 2 July 2021	Interview via Teams of highest scoring candidates
Early July 2021	Notification of intention to award contract
July 2021	Inception Meeting
July 2021 onwards	Completion of Lots as required
July 2024	Approximate expectation of project completion



## **10.0 Contract Term**

6.21 This contract is being tendered for a three year period which is expected to be until June 2024.

## **11.0 Costs**

- 8.1 Bidders should provide quotations based upon the following development scenarios:
- a. Up to 50 dwellings
  - b. Between 50 and 250 dwellings
  - c. 250 dwellings or more
  - d. Student accommodation buildings
  - e. Mixed development including 500 plus dwellings and employment and/or retail premises
- 8.2 For more complex cases a bespoke fee may be necessary to be agreed on an individual case basis with the Council. Hourly rates should therefore be provided together with example costs.
- 8.3 Hourly rates and an estimate for attendance at Informal Hearing and Public Inquiries (e, f and e in each of the Lots respectively) should be provided.
- 8.4 Payment would normally be made on the completion of each Lot to the satisfaction of the Council and following 28 days from the receipt of an undisputed invoice.

## **12.0 Council Named Contact Points**

The main points of contact for these projects are set out below along with the relevant contact details:

Fiona Clark  
Planning Officer (Housing and Communities, Planning and Housing Strategy)  
e-mail: [fjclark@lancaster.gov.uk](mailto:fjclark@lancaster.gov.uk)  
Tel: 01524 582222

Andrew Drummond  
Service Manager – Development Management  
e-mail: [adrummond@lancaster.gov.uk](mailto:adrummond@lancaster.gov.uk)  
Tel: 01524 582351

Postal Address:  
Planning Policy and Place Service  
Directorate of Economic Growth and Regeneration  
Lancaster City Council  
PO Box 4  
Lancaster Town Hall  
Dalton Square  
Lancaster  
LA1 1PJ

## **13.0 Evaluation Criteria and Methodology**

A number of sub-criteria for the quality weighting will be used together with the price submitted for the works in order to determine who will be awarded the contract.

Any deviations or minor changes to the contract specification may be considered acceptable during the evaluation process, if it can be demonstrated that such a change has is a clear benefit to the council. Acceptance of any changes will be at the council’s discretion.

A selection of Consultants may be invited to attend an interview/make a presentation to explain their bid in further detail.

**It is important that the correct format for the completion of the schedule is followed.**

The criteria will enable the Council to identify the applicants who in the opinion of Officers offers best value for money to the Council.

The award criteria is based on value for money issues and the applicants’ technical submissions as listed below.

The Council reserves the right to clarify any of the information provided.

The information will be scored in accordance with the principles set out below.

<b>Evaluation Matrix for Invitation to Tender Process</b>	<b>Score</b>	<b>Mark Awarded</b>
Quality	60%	
Social Value	10%	
Price	30%	

**Figure 1 - Evaluation Matrix for the Fixed Price Elements Invitation to Tender Process**

The Council reserves the right to reject a tender should the price be abominably low. All other tenders will be evaluated using the following criteria.

Listed below is the scoring model for the scoring principles for each element of the qualitative selection criteria.

<b>Score</b>	<b>Scoring Principles</b>
<b>0</b>	<b>Rejected</b> – Evidence is unacceptable or non-existent, or there is a failure to properly address any issues.
<b>1 - 3</b>	<b>Poor</b> – The evidence is deficient in certain areas where the details of relevant evidence require the reviewer to make assumptions.
<b>4 - 6</b>	<b>Satisfactory</b> – The evidence is acceptable, but with some minor reservations. The response deals only with processes and little output evidence is provided.
<b>7 - 8</b>	<b>Good</b> – The standard of evidence fully meets expectations.
<b>9 - 10</b>	<b>Outstanding</b> – The standard of evidence exceeds expectations. The response demonstrates clear and strong evidence of delivery as part of an integrated team and how this has become part of a continuous improvement process.

**Figure 2 – Principles for Evaluating Proposals**

Individual members of the Assessment Panel will score the bidder, using the scoring principals set out above, against each of the agreed quality criteria, multiply this by the respective weighing percentage (Price 30% and Quality 70%) and total the scores to give a total quality

score out of 100. In practice, individual scores can be fed into a scoring matrix which collates and amalgamates the individual scores and creates an overall aggregated score.

The evaluators will use the following scoring model for the quality assessment.

<b>Scoring Checklist for Tender Submissions</b>				
<b>Quality &amp; Experience Evaluation</b>		<b>Marks out of 10</b>	<b>Weighting</b>	<b>Weighted Scores</b>
<b>1</b>	Technical Suitability and Capability		<b>25</b>	
<b>2</b>	Capacity to Deliver and Timescales		<b>20</b>	
<b>3</b>	Added Value		<b>5</b>	
<b>4</b>	Previous Relevant Experience		<b>25</b>	
<b>5</b>	Methodology and Analysis		<b>25</b>	
			<b>100.00%</b>	<b>Normalise to 60%</b>
<b>Social Value Evaluation</b>				
<b>6</b>	Social Value Details of the social value criteria are provided in the section 'Evaluation of Social Value Requirement – Information for Bidders'. This will be completed on the Social Value Portal website. <a href="https://socialvalueportal.force.com/supplieraccountregistration?svprojectid=4J0-0000-NmJQc">https://socialvalueportal.force.com/supplieraccountregistration?svprojectid=4J0-0000-NmJQc</a>		<b>100.00%</b>	<b>Normalise to 10%</b>
<b>Financial Evaluation</b>				
<b>7</b>	Price		<b>100.00%</b>	<b>Normalise to 30%</b>

**Figure 3 – Headline Scoring Model**

Lancaster City Council reserve the right not to award all or any of the business to the best scoring Service Provider or to any Service Provider.

**During the evaluation period, Lancaster City Council reserve the right to request or to seek clarification, in writing or by means of a clarification meeting, with any or all of the Bidders.**

**Where a bidder has made an error in a quotation submission Lancaster City Council may ask the bidder to confirm or withdraw their tender. However, where a bidder has made a visible and genuine arithmetical error they may be given the opportunity to correct the error.**

## 14.0 Instructions for Completion

Recipients are invited to complete their tender submission and provide any supporting information requested, to the Council via The Chest supplier portal, by the due date for return in accordance with the procedures set out in the paragraph below entitled “Submission of Completed Tenders” and following the prescribed format.

A separate tender submission, including price, evaluation quality criteria and associated documents, is required for each Lot. Please complete the table below to confirm which lots you are tendering for.

Lot	Please tick the Lots you wish to be considered for
Lot 1 Viability Assessment of financial data (development costs and development values) submitted with planning applications	
Lot 2 Assessment and advice with regard to development costs, in particular costs associated with abnormal development costs and external development costs	
Lot 3 Assessment and advice with regard to the necessity for and extent of abnormal and external works (e.g. specific foundations, SuDS)	

Tenderers are advised neither to make any assumptions about their past supplier relationships with the Council, nor to assume that such prior business relationships will be taken into account in the evaluation procedure unless explicitly stated.

The Council will not reimburse any costs incurred in connection with preparation and submission of responses to this tender. The Council reserves the right to terminate this tender process at any time and under no circumstances shall the Council incur any liability in respect of this tender or any supporting documentation.

Any canvassing – direct or indirect - of any Councillor or employee may result in disqualification.

### **Queries about the procurement**

If the Council considers any question or request for clarification to be of material significance, both the question and the response will be communicated, in a suitably anonymous form, to all potential consultants who have responded.

All responses received and any communication from potential consultants will be treated in confidence but will be subject to this paragraph.

### **Consortia, retained consultants and sub-consultants**

Where a consortium or sub-consulting approach is proposed, all information requested should be given in respect of the proposed prime consultant or consortium leader.

Relevant information should also be provided in respect of consortium members, retained consultants or sub-consultants who will play a significant role in the delivery of services or products under any ensuing contract.

The Council recognises that arrangements in relation to consortia, retained consultants and sub-consulting may be subject to future change. Service providers/suppliers should therefore respond in the light of such arrangements as are currently envisaged.

Potential consultants are reminded that any future change in relation to consortia, retained consultants and sub-consultants must be notified to the Council so that it can make a further assessment by applying the selection criteria to the new information provided.

Details should also be provided in relation to the proportion of any contract awarded that the potential consultant proposes to subcontract.

### **Contact Point**

Potential consultants are asked to ensure that the single point of contact nominated on The Chest is maintained as this will be the chosen method of contact with tenderers. The Council will not be responsible for contacting the potential consultant through any route other than the nominated contact via The Chest.

### **Freedom of Information**

In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA'), all information submitted to the Council may be disclosed in response to a request made pursuant to the FoIA.

In respect of any information submitted by a potential consultant that it considers commercially sensitive the potential consultant should;

1. clearly identify such information as commercially sensitive;
2. explain the potential implications of disclosure of such information; and
3. provide an estimate of the period of time during which the potential consultant believes that such information will remain commercially sensitive;
4. please submit responses to 1, 2 or 3 above as an Annex with the completed tender.

Where a potential consultant identifies information as commercially sensitive, the Council will endeavour to maintain confidentiality. Potential consultants should note, however, that, even where information is identified as commercially sensitive, the Council might be required to disclose such information in accordance with the FoIA. Accordingly, the Council cannot guarantee that any information marked 'commercially sensitive' will not be disclosed.

### **Submission of completed tenders**

Submissions will only be accepted via the supplier portal, The Chest. Should any tenderer have any problems with the system they must in the first instance contact Proactis (contact details available on the home page).

## Evaluation Quality Criteria

The Evaluation will be carried out and will be assessed with specific regard for the listed sub criteria.

You are invited to detail your proposals for the delivery of the contract under the following sub-criteria. Please complete and provide a separate response to the Evaluation Quality Criteria for each Lot.

Where joint tenders are submitted, evidence of joint working should be provided.

### Technical Suitability and Capability

Submissions will be based on the knowledge, skills, experience and qualifications of the staff, including specialised technical knowledge.

### Capacity to Deliver and Timescales

Submissions should identify how the project will be managed to ensure the outputs are delivered. A timescale for the delivery of each individual assessment should be provided. The availability of staff within the organisation to undertake this work will be assessed. The details should include measures to ensure that the work can be carried out should the personnel be affected by Covid19, Covid19 emergencies or restrictions (or other similar emergency) and how this may affect timescales.

**Added Value**

For example, capacity for informal discussion and advice, collaborative working, evidence of working with QS/Engineers.

**Previous Relevant Experience**

Past experience will be examined in detail to ensure that the commissioned consultants have the ability to provide the required outputs. At least two relevant references should be provided from previous contracts.

**Methodology and Analysis**

Submissions will be assessed based on the proposed method for undertaking the project delivery and outputs. This will take into account the consultants own views on why they are the most appropriate contractor for the project.

For Lot 1, specific criteria and methodology should be provided for determining build, land costs and value, including where appropriate standardised percentages and the justification used to support them.



Price

Price will be evaluated for equally for both the fixed price element for appraisals and the hourly rate. Details should be provided of the work to be included within the fixed costs.

## Social Value

The council's Contract Procedure Rules and Procurement Strategy now include the requirement for Social Value and Local Wealth Building to be included in any procurement exercise. There is a requirement that should an opportunity be expected to exceed a certain price threshold then Social Value will be included in the evaluation criteria. In order to provide a consistent application of requirements the city council has approved the use of The National Themes, Outcomes and Measures (TOMs) Social Value Measurement Framework – an open source and free to use mechanism designed for organisations that want to embed social value into their procurement or measurement activities and it aims to create practical ways to unlock more social value for communities.

The TOMs are a core set of measures. Each of these measures has specific Measurement units, financial proxy values as well as notes that will be required at management and measurement stage. The financial proxies allow the council to monetise each measure.

If you don't already have a Social Value Port account you will be required to set up a "Social Value Portal Account". Please refer to "The Social Value Portal – guidance for Bidders" and register your information using the project references:

Lot 1 Viability Appraisals of Planning Application Development Costs Submissions:  
<https://socialvalueportal.force.com/supplierregistration?svpprojectid=4J0-0000-NpHPc>

Lot 2 Quantity Surveyor Advice on Development Proposals- Planning Applications:  
<https://socialvalueportal.force.com/supplierregistration?svpprojectid=4J0-0000-NpHPX>

Lot 3 Engineer Advice on Development Proposals and Costs - Planning Applications:  
<https://socialvalueportal.force.com/supplierregistration?svpprojectid=4J0-0000-NpHPi>

Review the definitions, Units and Evidence Requirements for the Measures you can deliver, to make sure you can deliver and evidence social value.

The "local area" in this instance means the Lancaster District local Authority area.

Make a reasoned commitment against the measures included in the Social Value Portal tool. The monetised value of your social value offer will be assessed in relation to the monetised offer from other bidders.

**Bidders should note that social Value outcomes will be regarded as Key Performance Indicators for the purpose of contract performance. Failure to provide the outcomes offered and / or provide evidence that the offered service has taken place to adequate quality standards may result in a contract penalty.**

## Undertaking

When you have completed the Invitation to Tender, please ensure that:

1. You have answered all the questions.
2. You have provided all documents requested.
3. You have read and signed the undertaking below.

Please complete a separate Undertaking for each Lot.

I / We certify that the information supplied regarding the Organisation is accurate to the best of my knowledge and that I accept the conditions and undertakings requested in the invitation to tender. I / We understand and accept that false information could result in rejection of the application to be selected to take part in the tender process.

I / We also understand that it is a criminal offence, punishable by imprisonment, to give or offer any gift or consideration whatsoever as an inducement or reward to any servant of a public body. I / We also understand that any such action will result in rejection of our application to take part in the tender procedure and empower the Council to cancel any contract currently in force.

I / We understand and agree that if our tender is successful that the Organisation will purchase professional indemnity insurance as required if such insurance is not already held.

**NB This undertaking is to be signed by a Partner, Director or authorised representative i.e. in their name on behalf of the Organisation.**

Signed for and on behalf of the Organisation:	
Signed:	
Position/Status in the Organisation:	
Organisation's name:	
Organisation's address:	
Date:	

Tender Declaration

**CONTRACT FOR:**

**Viability Appraisals of Planning Application Development Costs Submissions  
&  
Quantity Surveyor Advice on Development Costs Submitted in Association with  
Planning Applications  
&  
Engineer Advice on Development Proposals in Association with Planning  
Applications**

Delete as appropriate  
Please complete a separate Tender Declaration for each Lot.

Name and Address of Tenderer	
Telephone Number	
E-mail	

I / We agree that the insertion by me/us of any conditions qualifying this tender or any unauthorised alteration of any of the tender documents shall not affect the requirements of the specification and may cause the tender to be rejected.

I / We agree that this tender shall remain open to be accepted or not by the Council and shall not be withdrawn for a period of six months from the date of tender submission.

1. Unless and until a formal agreement is prepared and executed this tender together with your acceptance thereof in writing shall constitute a binding contract between us.
2. I / We certify that the details of this tender have not been communicated to any other person or adjusted in accordance with any agreement or arrangement with any other person.
3. I / We understand that you are not bound to accept the lowest or any tender you may receive.
4. I / We certify that this is a bona fide tender.

**Signature(s)**\_\_\_\_\_ **(print in full)**\_\_\_\_\_

**Position in Organisation** \_\_\_\_\_

Declaration of Non-Collusion

**To: Lancaster City Council**

Reference:

XX

The essence of open tendering is that the Council shall receive bona fide competitive tenders from all firms tendering. In recognition of this principle, I / We certify that this is a bona fide tender, intended to be competitive and that I / We have not and will not (either personally or by anyone on my / our behalf):

1. Fix or adjust the amount of the tender (or the rate and prices quoted) by agreement with any other person.
2. Communicate to anyone, other than the person calling for this tender, the amount or approximate amount or terms of the proposed tender (except other than in confidence, where essential to obtain professional advice or insurance premium quotations required for the preparation of the tender).
3. Enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount or terms of any tenders to be submitted.
4. Canvass or solicit any Member, officer or other employee of the Council in connection with the award of this or any other Council contract or tender.
5. Offer, give or agree to give any inducement or reward in respect of this or any other Council contract or tender.

Dated	
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Name	
Position held	
Address of Tenderer	
Signature	