



Homes  
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Making homes happen

# Multidisciplinary Framework - Masterplanning Invitation to Tender (Stage 3)

## South West Rugby

Issue Date: 14/11/2022

# Table of Contents

Introduction .....	3
<b>Part 1 – Commission Requirements</b>	
1. Strategic Context .....	5
2. Site Background .....	7
3. Planning Status.....	8
4. Homes England’s Role at SW Rugby.....	10
5. Homes England’s Objectives .....	14
6. Strategic Vision.....	14
7. Services and Key Deliverables .....	15
8. Site and Supporting Information .....	20
9. Indicative Programme.....	21
10. Management .....	21
11. Invoicing and Payment.....	22
12. Other Requirements.....	22
<b>Part 2 – Instructions for Submitting a Response</b>	
1. General.....	24
2. Quality .....	25
3. Pricing .....	25
4. Evaluation .....	26
5. Documents to be Returned .....	26
6. Evaluation Criteria .....	27
7. Worked Example .....	30
<b>Part 3 – Response Form</b>	
3.1 Response Form .....	33
3.2 Resource and Pricing Schedule.....	34

# Introduction

1. Homes England set out a five-year strategic plan in 2018:

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/752686/Homes\\_England\\_Strategic\\_Plan\\_AW\\_REV\\_150dpi\\_REV.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752686/Homes_England_Strategic_Plan_AW_REV_150dpi_REV.pdf)

2. In line with our organisational strategic objectives, we have a mandate to:

- Provide expert support for priority locations, helping to create and deliver more ambitious plans to get more homes built.
- Promote better design and higher quality places.
- Understand the need and opportunity for investment in land, infrastructure to unlock the market and support affordability of housing.

3. As part of the Agency's 5-year plan, several significant acquisitions of large-scale stalled sites have been made, with a range of Agency interventions available to enable the progression of these sites including direct investment, a master developer role, enabling and the provision of other support. The acquisition of circa 92 ha of land at South West Rugby represents one of these acquisitions (completed in March 2020).

4. Homes England seeks to appoint a masterplanner and landscape consultant via its framework team to provide ongoing technical support to the project and to work with Homes England and its consultant team in the preparation of an outline application(s) for residential-led, mixed-use development on the site. A multi-disciplinary consultant is being appointed separately to work with the appointed masterplanner in the preparation of all planning and technical support required for the preparation submission and negotiation of the outline planning application(s).

5. Homes England anticipates that bidders will put together a bespoke team of leading practitioners/ disciplines leads to meet the specific requirements of this brief.

## Purpose of commission

6. The purpose of this Further Competition Invitation to Tender (ITT) is to award the call-off contract for the above commission. The Sifting Brief (Stage 2) concluded on 21 July 2022 and the ITT is the final stage for bidders to respond to prior to evaluation and award.

7. 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.

8. 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

## 1. Strategic Context

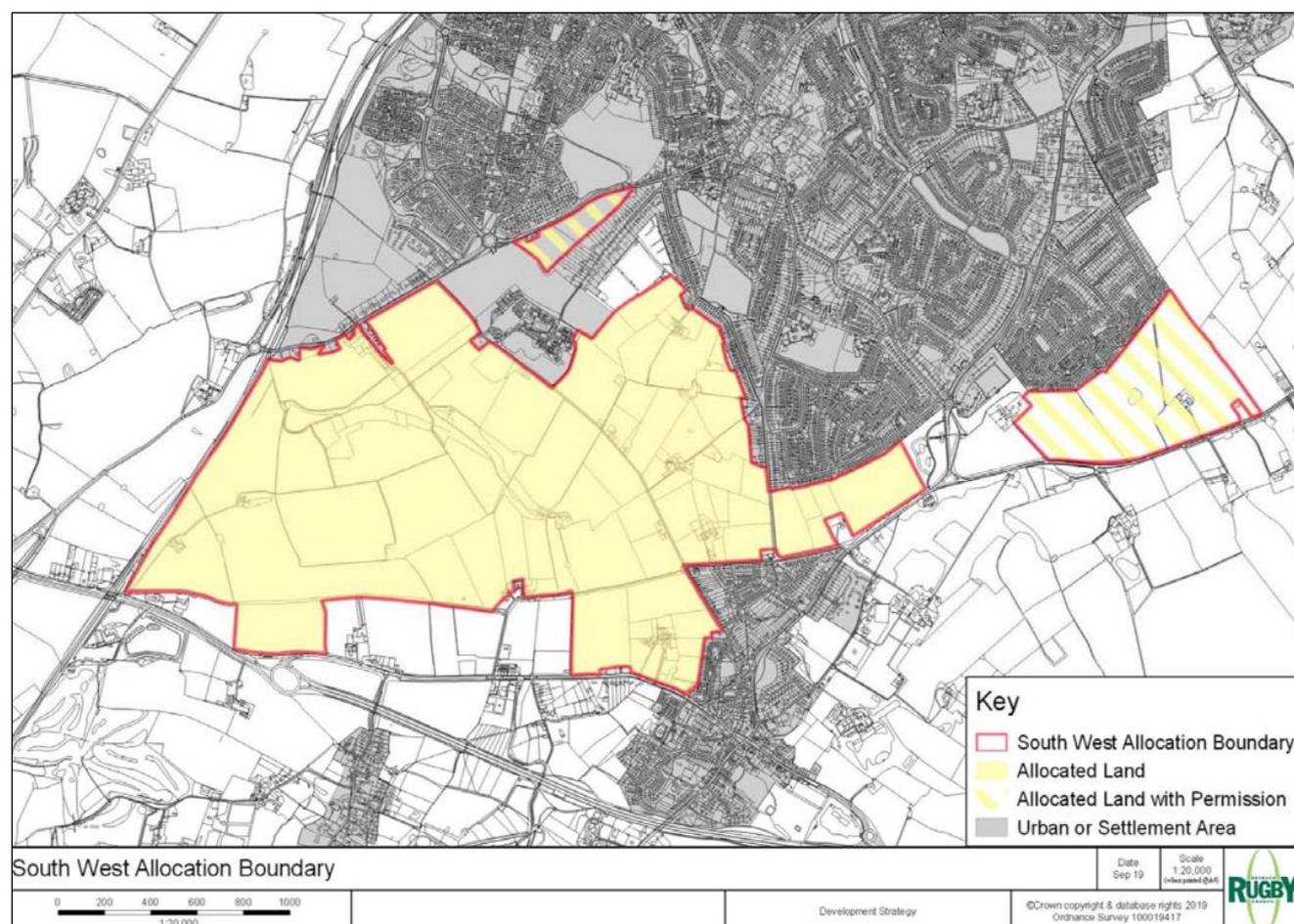
- 1.1. At South West Rugby (also referred to as “Homestead View”) Homes England is leading a Consortium of land promoters and developers (Taylor Wimpey, Richborough Estates, L&Q Estates) and working with Tritax Symmetry in respect of their residential landholdings. Homes England is working closely with the Consortium and with its Public Sector Partners (Rugby Borough Council and Warwickshire County Council) to drive a comprehensive and high-quality approach to development across the whole SUE.
- 1.2. Homes England is seeking to appoint a masterplanner/landscape architect to provide holistic project support to the Homes England Project Team as part of a multifunctional team. Whilst there are a number of clear deliverables, there will also need to be some flexibility in approach and with some stages/phases to be subject to lump sum assumptions as part of this tender response, but these will be subject to detailed fee agreements as the scope is clarified and the project develops (based on day rates and value for money assessments).
- 1.3. Core outputs include the development of a robust detailed masterplan for Homes England land with associated Design Codes and Parcel Codes, that reflect Building for a Healthy Life compliance, Building with Nature and Inclusive Design principles, and national model design code principles (including climate, community and character). In addition, to provide ongoing technical support to the project and to work with Homes England and its consultant team in the preparation of outline application(s) for residential-led, mixed-use development ensuring any planning permissions are commercially sound and viable.
- 1.4. The use of a bespoke team of specialist and experienced advisors (whether via subconsultants or in-house) with a proven track record across areas such as Local and District Centres, and associated uses including education, health, sports and community uses, adopting a landscape-led design approach that is rooted in “Place” and “Community” will be essential to the commission.
- 1.5. Alongside this masterplanner appointment, a multi-disciplinary consultant is being appointed to provide the planning and technical support required for the preparation and submission of the outline planning application(s) and support the preparation of the Masterplan and Design Codes (including detailed green/blue infrastructure design, utilities) and the technical reports and studies needed for the Masterplanning, Design Codes, and technical packs for land parcel disposals. A property consultant has been appointed to provide commercial input and to undertaking development viability appraisals to ensure that the masterplan is commercially robust and maximises the deliverability of the site and achievement of Homes England objectives. The Property Consultant commission also includes the initial parcel disposals.
- 1.6. The successful masterplanner will need to work closely and collaboratively with this wider consultant team to ensure that the scheme maximises achievement of the Homes England Business Plan and Place Based objectives for the project.
- 1.7. Homes England has a commitment to maintaining high quality throughout the design and delivery process through to disposal and will require the masterplanner to support us in this throughout the design and disposal process. The masterplanning consultant will also be required to provide support to Homes England in the evaluation of tender submissions (quality) for each site marketed via the Homes England Dynamic Purchasing System.

- 1.8. Rugby Borough Council's Local Plan and adopted Supplementary Planning Document both provide details of the strategic infrastructure necessary to deliver a sustainable and successful development at SW Rugby, including the key highways infrastructure for the site.
- 1.9. The key objectives of this commission include:
- To refine the existing framework masterplan into evidence based, commercially successful and viable site-specific masterplans, to support planning applications and consents.
  - Develop and deliver the bespoke Vision for the project rooted in the draft Place Based Indicators (this work is substantially underway within the Project Team and anticipated to complete during the determination of the Outline Planning Application).
  - To prepare detailed Visioning documents that are Place Based and respond to the unique opportunities offered by the project, based upon the existing SPD and Framework Masterplan, baseline work undertaken to date, and emerging Concepts relating to Healthy Living and Food Production (recognising the agricultural heritage of the area). These are to be developed in consultation with local Communities, Stakeholders and future residents and opportunities for Co-Design utilised where appropriate.
  - To develop the detailed Homes England Masterplan (including Landscape Strategy) and Codes for the site. Key masterplanning principles relate to the development of a successful, sustainable, safe and beautiful place. These principles will need to include LTN 1/20 compliance, the "20-minute neighbourhood" concept, resulting in a detailed masterplan that is compliant with Building for a Healthy Life and considers principles of Building with Nature (potential for compliance and accreditation on Homes England land holdings).
  - Following the above, to support the Multidisciplinary Consultant (lead and planning co-ordination lead) and Homes England Project Team in:
    - The submission and determination of the Stage 1 Highways Infrastructure Application (Community Spine/Cawston Lane) including Landscape/Green/Blue Infrastructure design;
    - The submission and determination of the outline planning application and its determination (including preparation of supporting material, plans, drawings, visualisations and use of digital/technological solutions to support and enable community engagement); and
    - To support the project team to enable developers to secure reserved matters consents which accord with the Vision, Masterplans and Codes for the site in a timely and efficient manner.
  - The OPA will be for a residential-led mixed use development that is market facing, deliverable and flexible, including the preparation of necessary planning application documentation (e.g., input into the Design and Access Statements, engagement and consultation material etc.).
  - The outputs are to be compliant with National (including NPPF and the National Model Design Code) and Local Planning Policy and good practice in design.
  - To maximise the value, acceleration and housing potential of the site through effective parcelisation of Homes England landholdings.
  - Ensuring the creation of Social Value throughout all Homes England activity at South West Rugby.
  - To complete the Design Review process with Midlands Design (partially complete).
  - To prepare documentation to support effective stakeholder engagement, community engagement and co-design as appropriate (e.g., design charette/presentation material, visualisations etc).
  - To assist in de-risking the site and support the disposal of Homes England's land whilst maintaining the Vision and quality of the scheme throughout the process.

## 2. Site/ background

- 2.1. South West Rugby SUE is a strategic allocation in the adopted Rugby Borough Council (RBC) Local Plan (2019), and is set to deliver circa 5,000 new homes, primary and secondary schools, a new neighbourhood centre, 35 ha of employment land and green and blue infrastructure, in addition to key highways infrastructure that will bring improvements to the wider South West Rugby area.
- 2.2. The site's allocation includes the requirement for a new link road (the Homestead Link) to alleviate congestion on the nearby village of Dunchurch. The allocation site is identified on the plan at Figure 1 below:

*Figure 1 -South West Rugby allocation boundary*

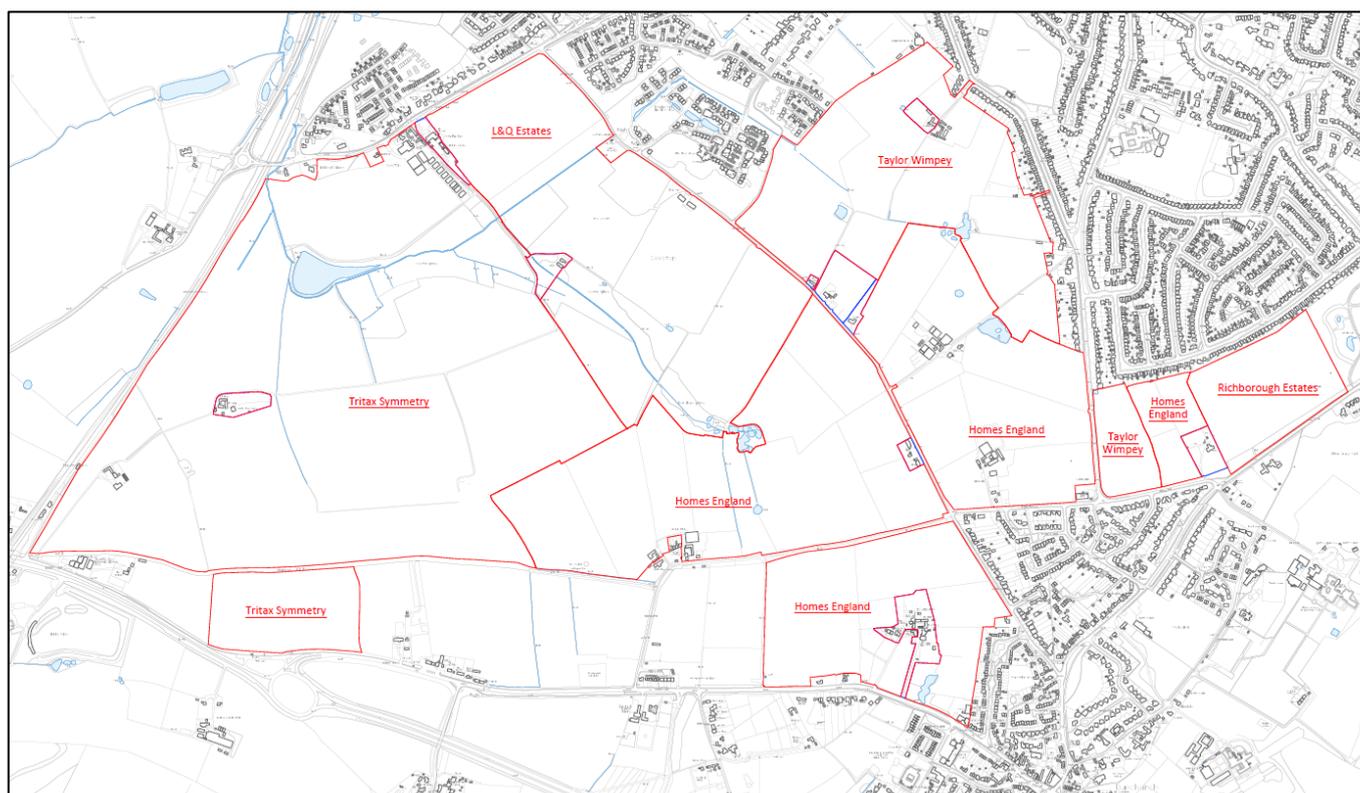


- 2.3. Comprehensive development had stalled on the site due to a range of factors including significant upfront infrastructure requirements, the complexities of an agreed mechanism to recover the costs of enabling infrastructure and the involvement of multiple landowners/promoters.
- 2.4. The requirement to deliver enabling infrastructure has been identified as key to unlocking the delivery of new homes at this site, including most notably the Homestead Link Road. To unlock development, in 2020 Homes England acquired 63.06 ha of land from Warwickshire County Council (WCC), and 29 ha of land from private ownership (M Deeley Land), totalling 92.06 ha. A further acquisition of land from a third party (Owen & Hayward) was completed in March 2022 totalling 3.55ha. Homes England has adopted the role of Master Developer and has secured funding from the Treasury that includes forward funding of strategic highways

including the Homestead Link Road, Cawston Lane and Community Spine Road, strategic utilities, and community infrastructure.

- 2.5. This funding is conditional on the need for the scheme to be 'an investable proposition' and for suitable mechanisms to be put in place for Homes England (and Treasury) to recover its investment. This includes the need for an all-party collaboration agreement, site wide masterplan, viability assessment, and infrastructure delivery plan.
- 2.6. Homes England has worked closely with the multiple landowners and has formed a consortium with Taylor Wimpey, L&Q Estates and Richborough Estates. In addition, the consortium is working with Tritax Symmetry on the delivery of utilities on the site.
- 2.7. The Collaboration Agreement, site wide framework masterplan, site wide viability assessment and the infrastructure delivery plan are all expected to be agreed with the consortium by the end of 2022 and in advance of the appointment of a masterplanner/landscape consultant.
- 2.8. The ownership / promotion boundaries of the site are identified on the plan at Figure 2 below and at **Appendix 1**.

*Figure 2 - South West Rugby land ownership*



### 3. Planning Status

- 3.1. The Council adopted the South West Rugby SPD in June 2021 to guide development on the site. The key policy objectives from both DS8 and DS9 of the Local Plan (2019) are key threads to the SPD.

- 3.2. Policy DS8 of the Local Plan (2019) allocates South West Rugby to provide around 5,000 dwellings and 35 ha of employment land for B8 uses, and clearly states that the Council will not support ad hoc or piecemeal development.
- 3.3. Policy DS9 allocates land to facilitate the full alignment of the South West Rugby spine road network to support and enable the South West Rugby allocation to be developed comprehensively.
- 3.4. The SPD includes a Masterplan that sets out the Council's preferred locations for open space, access, play areas, the school or schools, primary roads and other features.
- 3.5. Two parts of the allocation already benefited from planning permission prior to Homes England's involvement on the site. The locations of which are identified by the yellow stripes on the plan at Figure 1. These are:
- An outline application for up to 860 homes and a new primary school was granted at Appeal in July 2017 (LPA Ref: R13/2102). The application was submitted by L&Q Estates (then Gallagher Estates). Reserved matters have been submitted and development has commenced on site.
  - An outline application for 150 homes was approved in January 2018 (LPA Ref: R15/1816). The application was submitted by Miller Homes. Reserved matters have been approved the development is largely complete.
- 3.6. The remainder of the allocation is being progressed by numerous other private landowners and promoters (Taylor Wimpey, Tritax Symmetry, L&Q Estates and Richborough Estates) and by Homes England.
- 3.7. Despite the need for the site to be delivered in a comprehensive manner, a number of early applications have been submitted within the allocation. These include:
- An outline application for 186,500 sqm of B8 floorspace submitted by Tritax Symmetry secured a resolution to grant planning permission subject to the completion of a s106 at planning committee on 16 September 2020 (LPA Ref: R16/2569). The s106 was completed and the decision notice issued in November 2020.
  - Tritax has since submitted an application for full details of the first two B8 units at the southern entrance to the site (LPA Ref: R20/1026) which has now been approved and is being constructed. Several other reserved matters applications relating to different phases of the scheme have been submitted and are being considered by the Council.
  - An outline application for 210 homes and a new primary school submitted by L&Q and validated in March 2019 (LPA Ref: R18/0936). The application was considered at planning committee in March 2021 where members resolved to approve the application subject to the completion of a s106 agreement. The decision notice has not yet been issued as the s106 agreement has not yet been agreed.
  - An outline application for 275 homes submitted by Tritax Symmetry and validated in May 2019 (Ref: R18/0995). The application is still being considered by the Council.
  - An outline application for 350 homes submitted by Tritax Symmetry and validated in August 2022 (Ref: R22/0853). The application is still being considered by the Council.
- 3.8. In addition, Homes England has prepared a planning application for the Homestead Link Road and this application was submitted in August 2022 and validated in September 2022 (Ref: R22/0928).

- 3.9. A significant amount of public engagement in relation to the for the Homestead Link Road has been undertaken. Key themes arising will need to be considered in the context of the ongoing community engagement work for the project and which we will require the masterplanner to support us in undertaking.

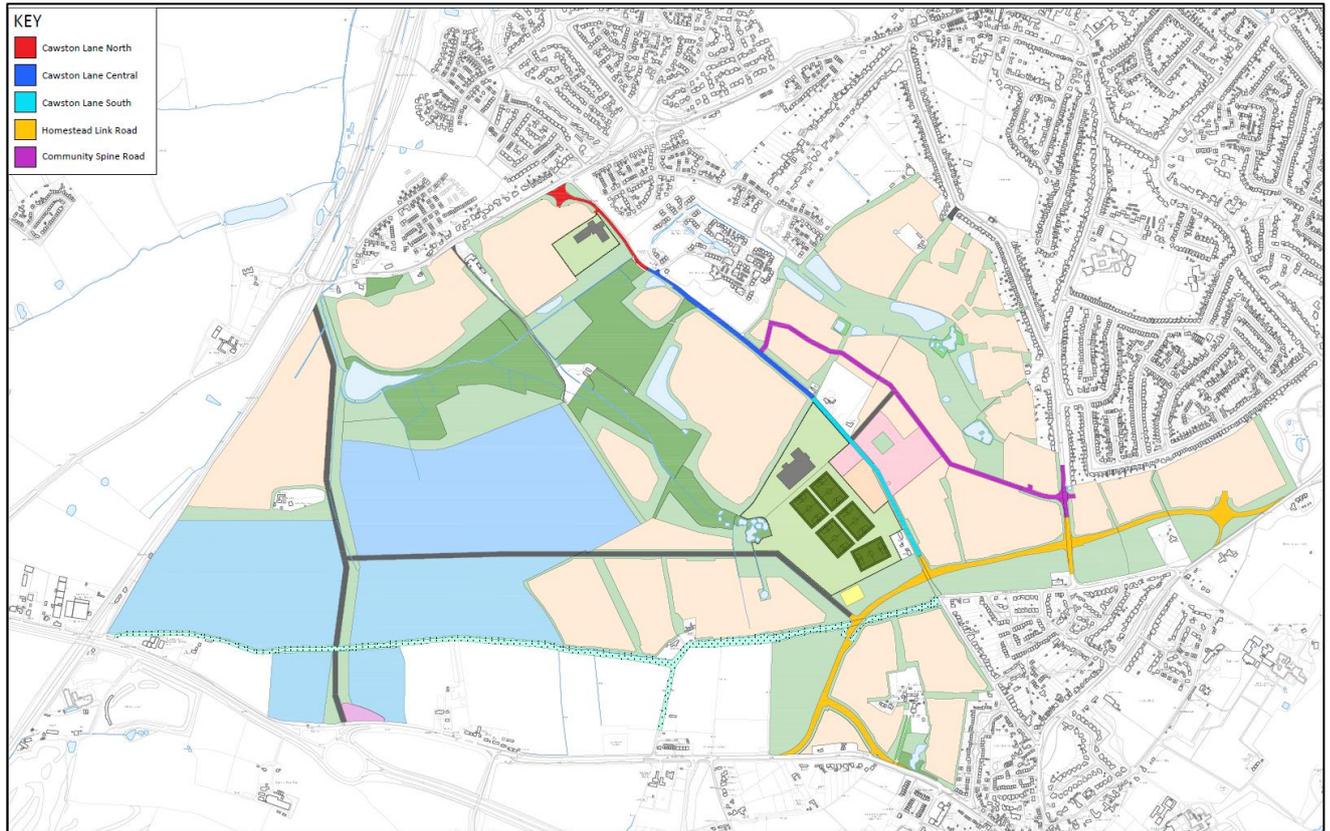
## 4. Homes England's role at SW Rugby

- 4.1. Homes England has a dual role at SW Rugby SUE, as both Master Developer and landowner, which is reflected in the requirement in this commission.

### Master Developer Role

- 4.2. In its role as Master Developer, Homes England is forward funding and leading on the delivery of key highway and utility infrastructure and, in collaboration with the consortium. Homes England has led the preparation of a Site Wide Framework Masterplan and Strategic Infrastructure Delivery Plan that provides a basis for the phasing of the project.
- 4.3. Homes England's role as Master Developer includes:
1. The submission of a planning application for the Homestead Link Road and delivery of the road;
  2. The provision of utilities serving the site including electricity and foul drainage; and
  3. The preparation and submission of a planning application for highway works to Cawston Lane and the Community Spine Road and the delivery of the works.
- 4.4. Items 1 and 2 are progressing well and the consultant team are already appointed for these works.
- 4.5. A highways designer has already been appointed to design the scheme for Item 3, and the appointed multi-disciplinary consultant (procured via a separate ITT) will be expected to prepare the planning application and take the scheme through the technical approval process and support the delivery of the works.
- 4.6. The location of the highways works under Items 1 and 3 are shown on the plan at Figure 3 below (in yellow and dark blue/purple).

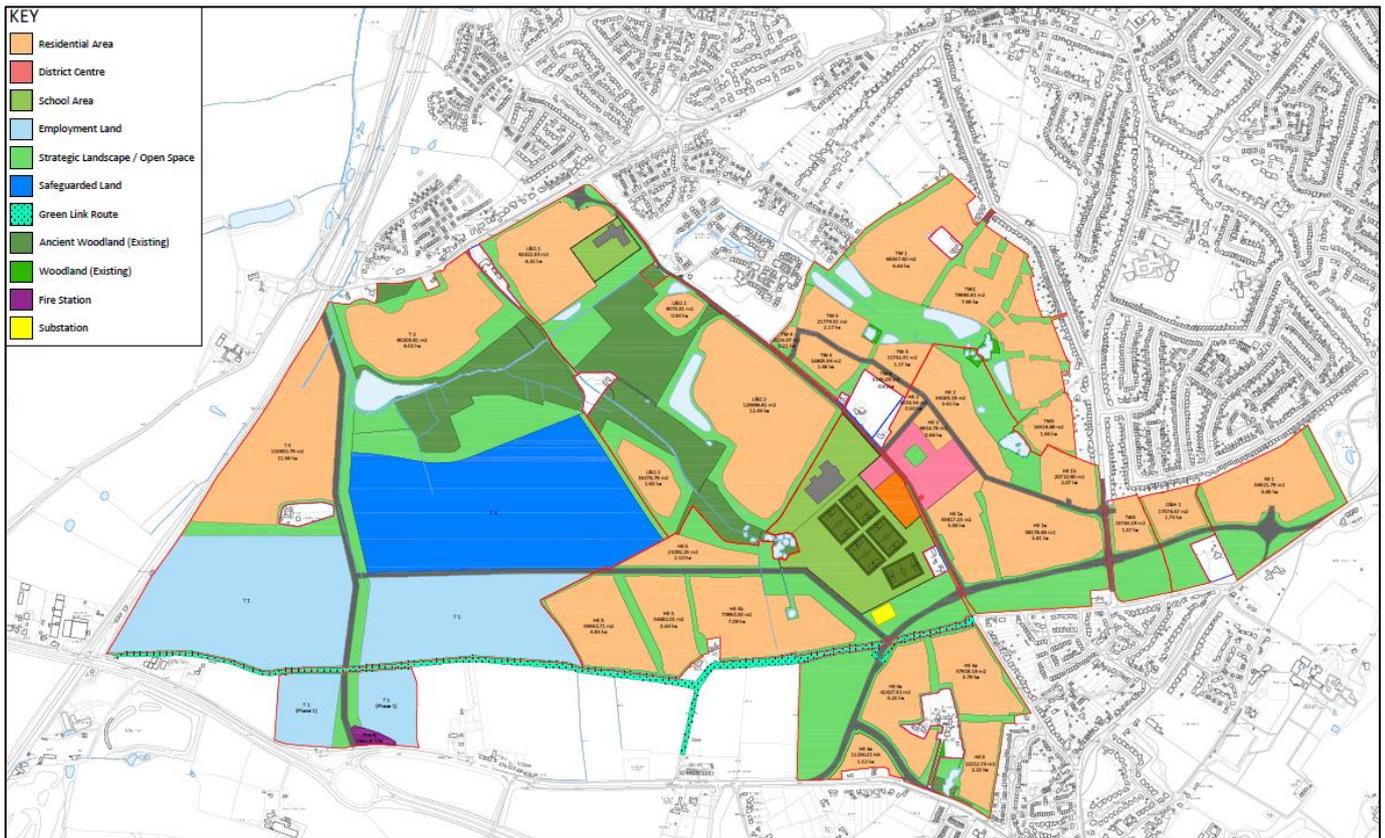
Figure 3 -South West Rugby development parcels



### Landowner Role

- 4.7. As landowner, Homes England is seeking to maximise housing delivery and supporting community uses on the 95.61ha of land in its ownership.
- 4.8. The Site Wide Framework Masterplan is provided at Figure 4 below (and provided at **Appendix 2**). The masterplan provides a fix on the maximum development area for each developer and location of infrastructure but is flexible enough to accommodate changes to the layout within the Homes England's parcels provided that the maximum developable area is not exceeded.
- 4.9. Homes England's parcels are identified as plots HE1 to HE5. Please note the parcel marked O&H1 is now in Homes England ownership and will be included as parcel HE1e.

Figure 4 -South West Rugby development parcels



- 4.10. It is currently anticipated that the Homes England land will be subject to a single outline planning application.
- 4.11. The current phasing assumptions (subject to refinement with the appointed consultant team) are as follows:

**Parcel HE1a**

- 4.12. The parcel of land identified for potential delivery of up to circa 340 units starting between 2025/26 and 2026/27. Parcel HE1a will be split into two parcels subject to two separate disposals through DPS, currently anticipated to be as follows:
  - **SME:** Anticipated a parcel will be delivered targeting SMEs to deliver circa 70 standard housing units between 2025/26 and 2026/27.
  - **PRS:** It is currently envisaged that this plot would be suitable for the delivery of circa 170 PRS units between 2025/26 and 2026/27 to diversify residential typologies and to prevent over supply of market housing across the wider SWR SUE site.
  - **MMC:** Up to 100 units between 2026/27 and 2028/29.

**Parcel HE1b**

- 4.13. Parcel of land identified for potential delivery of up to circa 77 residential units between 2028/29 and 2031/32. Homes England are currently in negotiations with one of the Consortium members over a potential negotiated disposal of part of this site.

#### Parcel HE1c

- 4.14. This is the parcel of land identified for the all-through school and community sports pitches to be transferred to WCC. Delivery timescales are to be confirmed, and these parcels will ultimately be transferred to WCC in due course once outline planning permission is secured.

#### Parcel HE1d

- 4.15. Central to the project area, this parcel is expected to be a mixed-use development comprising local centre with retail and community services including health care hub, as well as some residential. The delivery of this parcel is expected to be phased, and timescales for delivery are to be confirmed and dependent partly on healthcare requirements. Please note the 'Services' section below that set out a requirement for some focussed work on developing the right balance of uses for this element of the scheme to ensure the best provision in terms of services and amenity.

#### Parcel HE1e/O&H1

- 4.16. Referred to on plans as Owen and Haywood land, this parcel of land has recently been acquired by Homes England and is capable of delivery of circa 53 residential units between 2025/26 and 2026/27.

#### Parcel HE2

- 4.17. Being adjacent to the local centre, this parcel provides potential for a mix of standard housing and retirement living totalling circa 176 units, timescales will be dependent upon delivery of HE1c and HE1d, but we anticipate delivery will commence in 2026/27. Current assumptions are that this parcel will be disposed of in two parcels, one is highly likely to include senior living. Each parcel will be subject to a separate disposal process through DPS.

#### Parcel HE3

- 4.18. This site could accommodate circa 82 residential units and given its size and location will be targeted towards SME developers, but this will be refined as part of the disposal strategy subject to market testing.

#### Parcel HE4

- 4.19. Development of circa 339 residential units between 2030-31 and 2034/35. It is currently envisaged that part of this site could be targeted to SME developers, with a disposal of a parcel capable of delivering 90 residential units being subject to its own disposal process. The remaining land would be capable of delivering 249 residential units which is expected to be of interest to a plc housebuilder.

#### Parcels HE4b and HE5

- 4.20. Development of circa 649 residential units between 2031/32 and 2036/37.

#### Custom Build/ Self Build - (HE4a and HE3)

- 4.21. There is potential for early delivery of Custom Build/Self Build plots (possibly part of the 'Dunchurch parcel' (HE4a and HE3) subject to market advice) and the overall masterplan should consider options for this.

## 5. Homes England's Objectives

5.1. Homes England's key objectives for the project include (but not limited to):

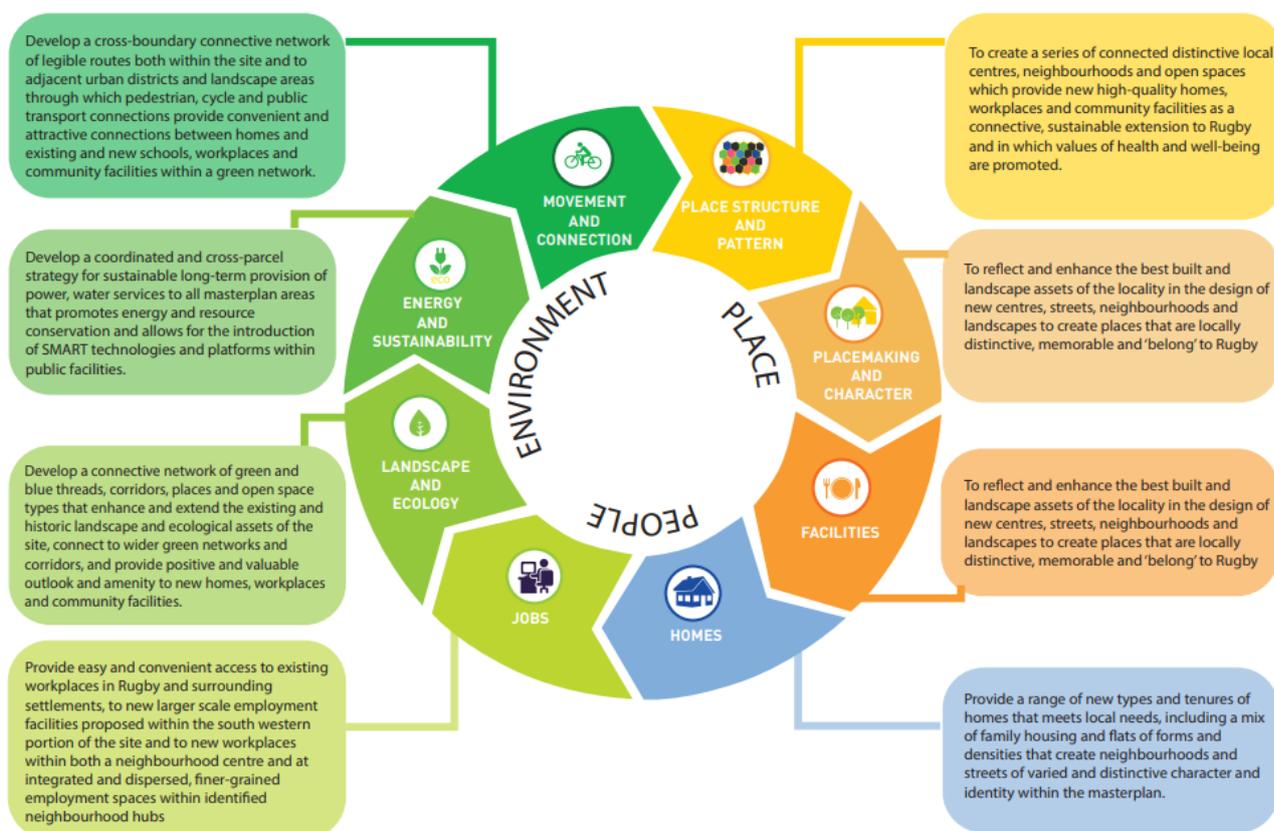
- Securing the delivery of better homes, faster, at South West Rugby;
- Ensuring high quality Place Making principles are adhered to;
- Drive value for money and efficiencies in project delivery;
- Lead an ambitious and commercial approach to the delivery of SW Rugby;
- Collaboration and partnership working to be inherent throughout the project delivery process;
- Ensure accurate programme management giving confidence to the Homes England's sponsor department and project partners;
- Compliance with Homes England's approvals and funding conditions (to be provided to the successful supplier);
- Compliance with all legal and statutory obligations applicable to the delivery of the project are met during the duration of the appointment;
- Homes England is also working with Warwickshire County Council and Rugby Borough Council in developing a set of shared objectives, which will include addressing the declared Climate Change emergency.

5.2. In addition, as part of Homes England's Place Making approach, Building for Life 12 and Building with Nature are design standards that Homes England wishes to achieve at South West Rugby.

## 6. Strategic Vision

6.1. In conjunction with consortium members, an initial Masterplan Vision has been developed that sets out key themes around People, Environment and Place and will guide development of Homes England parcels. These are summarised in the image below.

## Masterplan Vision Prompts



## 7. Services and Key Deliverables

- 7.1. Suppliers should provide a fee quote for each of element of The Services listed below.
- 7.2. There is an imperative to commence the commission to meet the Agency's business plan objectives. The delivery programme for the outline planning permission is as follows:
  - Masterplan Development: initial draft masterplan to be completed by end of March 2023.
  - Public consultation and Community Engagement: ongoing February – December 2023.
  - Masterplan testing and refinement: April 2023- December 2023.
  - Pre-application: ongoing April 2023 – December 2023.
  - EIA Scoping: August/September 2023.
  - Preparation of planning application: December 2023 – March 2024.
  - Planning application submission to determination: March 2024- September 2024.

## Stage 1: Masterplan Development (split into four workstreams as follows)

### Stage 1a: Masterplan Development – General

1. Review Framework Masterplan and Visioning/ development work produced to date and provide initial high-level views on strengths and weaknesses, areas for improvement and any opportunities that can be incorporated.
2. Work with the multi-disciplinary consultant to provide an updated constraints and opportunities plan clearly articulating the implications on the masterplan. This output should include, but not be limited to active travel opportunities, parking provision, biodiversity corridors, biodiversity net gain potential and public open space connectivity.
3. Work with the appointed property and multi-disciplinary consultants to use the existing Framework Masterplan, Vision, and Principles as the basis to produce evidence based, commercially successful and viable detailed masterplans and associated documents that maximise the value, quality, and housing potential of the site.
4. Develop a robust and deliverable phasing strategy for the development parcels outlined above working alongside Homes England's appointed property and multi-disciplinary consultant.
5. Development of proving layouts for specific parcels within the site. For the purposes of pricing and submission of the tender, the Consultant should submit a price for providing **3 x proving layouts** of circa 200 home sized parcels. The Agency reserves the right to commission further proving layouts if deemed necessary, with the price to be reviewed and agreed (subject to vfm assessments at that time). This would be dealt with via the contract variation mechanism.

### Stage 1b: Masterplan Development – District Centre

- 7.3. There is a requirement for a dedicated workstream with Homes England, Rugby Borough Council, Warwickshire County Council, and the consultant team (masterplanner/property agent) to work up in detail the right mix of uses for the District Centre. The District Centre is to be delivered within Homes England ownership and this provides the opportunity to steer the form of development and provide a centre that is aligned to and meets the needs of the existing and new communities that will be served by this development.
- 7.4. The District Centre will include retail and community services with the potential for residential uses on upper floors. It will also need to include a community and healthcare hub and specialist residential accommodation (such as catered for retirement living/extra care etc). Early work is required to scope out this requirement and what would optimise the amenity and service provision for the new community.
- 7.5. It is anticipated that the education and health facilities can be used as an early phase of District Centre development to help drive footfall and vibrancy. Community uses, public realm, cultural/arts and independent provision will also be critical elements for the success of the Local Centre and responding to other Place Based needs and opportunities arising, with potential for Co-Design of elements to also be considered.
- 7.6. Opportunities for multi-use facilities to maximise efficient land-use, generate footfall and assist with long term management will be key, such as Community Use Agreements with the All Through School, potential to deliver Extra care/Older Persons Housing and shared community spaces. BtR/Rental accommodation may also offer opportunities for shared space and services.
- 7.7. Homes England will work with the masterplanner/landscape architect and other stakeholders to provide the specification and phasing for the education and health facilities (and other key uses as appropriate), and the consultant should undertake additional research as they deem necessary to develop an evidence-based

concept for the District Centre that meets the needs of existing and future communities. Local Centre Strategies relating to public realm/art/culture, parking provision, accessibility and public transport, use of SMART technology as appropriate, co-mobility hubs/travel plans, and leisure/recreation will be key elements of the workstream. Specialist expertise and experience in the design and delivery of Local/District Centres, Education and Health facilities will need to be demonstrated in submission responses.

- 7.8. The property consultant will take a lead role in the following tasks to support the masterplanner appointment:
1. Production of a high-level report providing an evidence base setting out an interpretation of the property market data and socio-economic demographics of local area to make recommendations on how this relates to identification of what nature of services will meet local need. The document will provide the masterplanner with an understanding what impact the evidence has on the masterplan for the District Centre in terms of uses, design, layout and phasing;
  2. Work collaboratively and iteratively with the masterplanning consultant, to produce indicative masterplans for the District Centre, which will be refined and finalised as the project progresses;
  3. Taking the lead on market testing that is required to refine proposals;
  4. Production of a phasing plan to highlight how the delivery of the scheme will be delivered in parallel with development of the wider site; and
  5. Updates to viability appraisals and sensitivity testing to inform decision making on the masterplan.
- 7.9. The scale and layout of the District Centre and the all-through school and its relationship with Cawston Lane is a critical part of the scheme. Cawston Lane and the Community Spine will need to provide a public transport route through the site, serving the District Centre and the schools. The appointed masterplanner will need to work closely with the highways designer to ensure that a comprehensive and deliverable scheme is progressed.

#### Stage 1c: Masterplan Development – Design Codes and Plot Passports

- 7.10. Development and refinement of design codes for Homes England landholdings to promote high quality in accordance with Building for a Healthy Life requirements, BwN, and any other relevant design that maximise quality of design, enhance sales values and sales rates, whilst being deliverable from a market and cost/viability perspective. These are to be developed through community engagement and with opportunity for co-design principles and digital engagement with the community and wider Stakeholders. Also, to be informed by soft market engagement undertaken by property consultant with developer's (including MMC developers), regional/national housebuilders, Custom Build and SMEs, to include Landscape and Public Open Space Strategy and Design requirements.

#### **Stage 2: Public consultation and Community Engagement and Activation**

- 7.11. The consultation and engagement strategy for the site has not yet been finalised. As part of this commission, we will require the appointed consultant to support the Multidisciplinary Consultant and Project team in the provision of a public consultation and strategy in collaboration with Homes England.
- 7.12. For the purposes of your quote, we suggest that you allow for a budget of up to £50,000 to support the Multidisciplinary team in public consultation and community engagement activities, inclusive of preparation of materials and attendance at events including formal public consultation and informal engagement activities, co-design/design charettes and workshops.
- 7.13. The Consultation and Engagement Strategy will need to be prepared in accordance with the Agency's Community engagement tool kit and "how to" guides. The Agency's definition of engagement is to:

*"Actively listen to and engage with people living, working, visiting and investing in an area, so as to inform and shape our ideas, support long term transformation and empower communities."*



7.14. We expect the Agency definition of community engagement and our Guiding Principles to be referenced, followed and demonstrated through all our engagement. The Consultant should consider specific engagement techniques for, and have impact across the following areas:

- place and design.
- social value.
- empowerment and stewardship.
- community and neighbourhoods.
- digital and prop-tech.

### Stage 3: Masterplan Testing and Refinement

7.15. Work with Homes England's appointed property consultants, multi-disciplinary consultant, wider partners and stakeholders to test the masterplan at an appropriate stage to reach the preferred option which will be progressed as the outline planning application scheme. The final masterplan option should aim to maximise:

- a. Achievement of Homes England policy objectives set out in the Homes England Strategic Plan and emerging Strategic Plan, relating to high quality Place Making and Place Based interventions, Sustainability, Social Value, MMC, SMEs, custom build, , and Building with Nature;
- b. The value and housing potential of the site in the context of the wider SWR SUE; and
- c. Scheme viability.

7.16. Work with key partners, including Consortium members, to enable a comprehensive approach to site wide development as planning applications come forward and to help to drive high quality development across Homes England landholdings.

#### Stage 4: Pre-application

- 7.17. The appointed masterplanner and landscape consultant will be expected to input into pre-application discussions with Rugby Borough Council and Warwickshire County Council and other key stakeholders.
- 7.18. Your budget should allow for up to five workshop sessions (circa 3 hours each) with Rugby and Warwickshire officers and preparation time and sufficient time and budget to allow for meetings with other stakeholders such as parish councils, local members, Sport England, Rugby Ramblers and the DfE.
- 7.19. We will also be seeking the views of Design Midlands on the masterplan and Codes. Working with the appointed masterplanner, we suggest that you allow for a budget to cover up to five workshop sessions with Design Midlands (allowing for three hours for each session).

#### Stage 5: Support in the preparation of Outline Planning Application(s)

- 7.20. Support the preparation of commercially sound planning application(s)/ deliverable scheme that meet Agency Strategic Objectives for residential-led mixed use development, to support the disposal of Home England's land.
- 7.21. Prepare relevant supporting evidence and documentation for outline planning application including (but not limited to):
  - Site Location Plan;
  - Parameter Plans;
  - Indicative Masterplan;
  - Landscape Masterplan (multifunctional green and blue infrastructure) and Planting Plans;
  - Work with the Multidisciplinary Consultant to develop the necessary strategies including Public Realm, Lighting, Arts/Culture, Parking and Green Travel Strategies;
  - Input into Sustainability Checklists as necessary;
  - Supporting visuals / artist impressions and use of digital tools as appropriate;
  - Design and Access Statement (which will include input from the wider consultant team);
  - Design Codes / Parcel Codes; and
  - LVIA Chapter for Environmental Statement.
- 7.22. And any other documents that you consider to be relevant.

#### Stage 6: Application submission and post submission

- 7.23. Include a quote for post submission work. Given that this is an unknown at this stage, we recommend that you allow a budget of circa £30,000 to cover any additional actions required post submission.

#### Stage 7: Support throughout disposal process via Homes England Dynamic Purchasing System

- 7.24. Support to the Disposal process from start to finish assuming 3 disposals linked to the outline planning application as set out above, with a price per disposal to be identified. Homes England may choose to extend this commission for subsequent disposals beyond the first 3 disposals but reserves the right to competitively tender future disposal work. This will include (but not be limited to) the following tasks:
  1. Input into ITT and technical disposal pack including development of tender evaluation criteria;

2. Either Homes England or the Consultant (with a % management fee) will be required to commission Midlands Design Network to prepare a BfHL pre-assessment and to assess 3 tenders against the BfHL pre-assessment. The masterplanner is expected to work closely with the Midlands Design Assessor in the BfHL assessment process, and scoring of top 3 sifted bids;
3. Preparation of Parcel Codes for the Residential Disposal Parcel;
4. Presentation/Q&A session for developer's bidding for the disposal to cover Design Matters/Design Codes/Parcel Codes, and highlighting the key relevant design principles to developers (allow 6 x 1-hour long presentations plus preparation time);
5. Detailed review and scoring of quality and design elements of the ITT submissions (allow for 3 detailed scheme reviews per disposal) including BfHL and other design tool requirements (e.g., BwN - but noting the Agency may utilise its own assessors for this purpose);
6. To work with the selected developer to ensure that reserved matters applications are prepared (and efficiently determined) that are consistent with the Vision for SW Rugby, meet the agreed disposal standards including Building for a Healthy Life;
7. To engage and utilise a range of Design Tools including Independent Design Review, and other standards. It will be necessary to engage with the ongoing Independent Design Review Panel process that has commenced as part of the Vision and Framework Masterplan stages, and incorporate recommendations within the development of the detailed masterplan design;
8. Appointment/payment of fees to the Midlands Design Review Panel Assessor to work alongside the Masterplanner in BfHL assessment and scoring of top 3 sifted bids; and
9. An ability to extend the Commission to incorporate an appropriate Design Competition (subject to detailed scope and brief/fees/value for money assessment), should this be requested by Homes England – for example, a Design Competition for an area of public realm or community use building (parameters to include cost/budget, user requirements etc).

### Ongoing

- 7.25. Provide regular updates and project briefings to ensure best practice from the project is captured and communicated to ensure close working with Homes England and the appointed consultant team.
- 7.26. To ensure that key project and Agency objectives relating to equality, diversity and social value are embedded within the project at every stage.
- 7.27. To ensure that value for money and cost engineering is considered throughout the project (enhancing values and managing costs).
- 7.28. Provision of ad hoc advice throughout the course of the instruction, for the purpose of pricing please assume 1 day a quarter over 12 months. This may include sharing lessons learnt, attendance at Homes England's Master Development Team Workshops, and input into gateway papers and approvals. This is to be billed based at the appropriate hourly/day rate applicable to the Framework contract at that time.

## 8. Site and supporting Information

- 8.1. Suppliers should familiarise themselves with the attached plans and documents:
  - SW Rugby Landownership Plan – Appendix 1.
  - Site Wide Framework Masterplan – Appendix 2.

8.2. In addition, suppliers should also review:

- South West Rugby Supplementary Planning Document (June 2021); and
- Rugby Borough Council Consultation Document on Climate Change and Sustainable Construction SPD (October 2022) (including Appendix 1a and 1b).

## 9. Indicative Programme

- 9.1. Suppliers are asked to identify any key risks to delivery of this programme in their response.
- 9.2. Suppliers should note the indicative programme dates when preparing their Programme information in the Response Form.

Key Delivery Milestones	Anticipated Dates and Timeframes
Issue Invitation to Tender	14/11/2022
Submission Deadline	14/12/2022
Selection of Preferred Bidder	09/01/2023
Commencement	23/01/2023

## 10. Management

- 10.1. The Supplier will be managed on a day-to-day basis by Ben Frodsham (Senior Planning and Enabling Manager), as the primary point of contact at Homes England. The wider project team includes:
- Guy Scott (Project Director);
  - Sarah Taylor (Head of Planning and Enabling);
  - Raj Sanghera (Head of Planning and Enabling - Infrastructure)
  - Allert Riepma (Head Of Disposals);
  - Ben Frodsham (Senior Planning and Enabling Manager);
  - Andrew Carter (Senior Planning and Enabling Manager);
  - Steve Dawson (Senior Development Manager);
  - Chris Sharpe (Senior Planning and Enabling Manager); and
  - Beth Lautman (Planning and Enabling Manager).
- 10.2. Other project team members may be added from time to time, and the project team will be subject to change over time.
- 10.3. The Supplier needs to work with Homes England's internal specialists, and the wider consultant project team already appointed on the project which includes:

- Arcadis (Project Managers and Cost Consultants);
  - Arcadis (Highways Design for Homestead Link Road and Cawston Lane North/Community Spine Road);
  - WSP (Site wide ecology);
  - TEP (Landscape consultants or the Homestead Link Road);
  - JLL (Property Advisors).
- 10.4. Homes England are also procuring for masterplanning and landscape consultants for the outline applications. The appointed multidisciplinary consultant will be expected to work with the appointed team once the procurement process for this stage of the project has concluded.
- 10.5. Other key Partners that the Supplier will need to work with include Rugby Borough Council, Warwickshire County Council, and the Consortium Members (Taylor Wimpey, L&Q Estates and Richborough Estates).

## 11. Invoicing and payment

- 11.1. Fees should be invoiced monthly, and during the 3rd week of the month to allow payment by the end of the month. Fee forecast schedules provided on a quarterly basis.
- 11.2. Fee invoices should identify clearly where any elements of the commission are recoverable from Consortium Partners (to be confirmed during the Commission). Records/schedules of recoverable fees will need to be kept by the Supplier and made available to Homes England and the Consortium as required.

## 12. Other Requirements

### Collateral Warranty

- 12.1. The proposed consultant will be expected to provide warranties for this commission to this parties as set out in the Framework Contract when Homes England dispose of serviced plots.

### Termination

- 12.2. 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.
- 12.3. 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.

### Conflict of Interest

- 12.4. 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.

- 12.5. 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.

### Confidentiality

- 12.6. This 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 ITT is vested in Homes England and may not be reproduced, copied, or stored on any medium without Homes England's prior written consent.
- 12.7. 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.

### Health and Safety

- 12.8. 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.

# Part 2: Instructions for Submitting a Response

## 1. General

- 1.1. The ITT deadline is **5:00pm on 14<sup>th</sup> December 2022** and tender responses **must** be submitted on ProContract. Please regularly check ProContract for any amendments to the ITT deadline. For all ProContract portal issues please contact [ProContractSuppliers@proactis.com](mailto: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 should check the 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 ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England's decision on whether a tender response is acceptable will be final.

- 1.8. Tender responses must be written in English.
- 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. Quality

- 2.1. A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Section 20 (Evaluation Criteria). The Response Form must be completed and returned as part of the tender response.
- 2.2. Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 2. 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).

## 3. Pricing

- 3.1. A Resource and Pricing schedule has been provided with this ITT which must be completed and returned as part of the tender response.
- 3.2. The pricing approach for this ITT is set out in Section 4. Stages involving survey work is required to be itemised for with all other Stages requiring a lump sum fixed fee, with options for time charge extensions. Fees should include reasonable expenses where applicable.
- 3.3. Suppliers are asked to submit day rates in addition to the Resource and Pricing Schedule, with the Framework Rates as the maximum for each grade that will be applied. The day rates are required for management of the further / additional work.
- 3.4. 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.
- 3.5. 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.

## 4. Evaluation

- 4.1. 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 6 (Evaluation Criteria) below and the scoring approach is detailed in Section 7 (Worked Example). Scores will be rounded to two decimal places.
- 4.2. 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.
- 4.3. Award decisions will be subject to the standstill period if over the EU Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.

## 5. Documents to be Returned

- 5.1. Suppliers are expected to provide the following information in response to this ITT:
  - Completed Response Form;
  - Completed Resource and Pricing Schedule; and
  - Supporting CVs for staff proposed to undertake this commission (no more than 2 pages each).

## 6. Evaluation Criteria

Quality will account for 70% 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.

Number	Criteria	Demonstrated by	Weighting
1	<b>Proposal</b>	Statement outlining method and approach explaining how the commission will be undertaken	20%

	<p>Approach to addressing the requirements of the Commission</p> <p><i>Maximum page limit = 4 A4 pages (minimum of 10-point font)</i></p>	<p>Schedule of services to be delivered</p> <p>Examples and Case Studies of similar scale schemes and specialist knowledge/additionality that the Consultant can bring to the Commission</p> <p>Information on other Supplier input that may be required</p> <p>Identification of other information that may be required</p> <p>Identify the potential impact and management solutions in respect of external influences and stakeholders</p> <p>Other commentary on the brief and opportunities for delivering at pace</p> <p>Supported by relevant examples/experience where applicable</p>	
2	<p><b>Proposed Staff</b></p> <p>Provide a breakdown of who will be undertaking the various elements of the Commission and how much time they will allocate to the project.</p> <p><i>Maximum page limit = 4 A4 pages (minimum of 10-point font)</i></p>	<p>Who will undertake the commission?</p> <p>Identify key members of staff and allocation to the required services</p> <p>Identify specialist input into, and experience of, District Centre/Health/Education delivery</p> <p>How much time will they devote to it?</p> <p>Resourcing information provided in Resource and Pricing Schedule</p> <p>Supported by CVs for key members of staff</p> <p>How will equality, diversity and inclusion (EDI) be embedded within the Commission? Please set out:</p> <ul style="list-style-type: none"> <li>. The diversity of the team working on the Contract;</li> <li>. The previous track record and/or expertise of the bidder in including innovative EDI terms and/or EDI related KPIs in similar work;</li> <li>. Clear and measurable EDI goals and outputs in the performance of this Commission in your response.</li> </ul>	15%

<p>3</p>	<p><b>Management arrangements</b></p> <p>Please identify 1 key point of contact for the day-to-day management of the instruction, and 1 project sponsor should any issues arise, and escalation is necessary.</p> <p>Please identify how much project management time will be allocated to the project (and by whom).</p> <p>Please allow appropriate time, as per the brief, for meetings with the Client and external parties, including LPA and County Officers, and the Consultant team</p> <p><i>Maximum page limit = 4 A4 pages (minimum of 10-point font)</i></p>	<p>How will the commission be managed?</p> <p>Who will be responsible for reporting to the Client?</p> <p>Who will manage the team?</p> <p>Where subcontracting arrangements are in place, who will manage the contract?</p> <p>Communication strategy</p> <p>Supported by relevant experience / examples where applicable</p> <p>How will risk be managed within the project</p> <p>Escalation management details, explaining how unforeseen problems are dealt with at a company level</p>	<p>20%</p>
<p>4</p>	<p><b>Programme/Timescales</b></p> <p>Please identify your programme for fulfilling the brief with specific reference to the timescales outlined in the brief.</p>	<p>Commitment to meeting the timescales outlined in the brief</p> <p>When will key milestones be complete?</p> <p>What is the programme for the required services including dates for completion?</p> <p>What are the key areas of risk to delivering the programme and how will this be managed / mitigated?</p>	<p>15%</p>

	Maximum page limit = 4 A4 pages (minimum of 10-point font)		
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Price will account for 30% 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	30%

## 7. Worked Example

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	20%	4	12	42
	2	4	15%	3	12	
	3	3	20%	4	12	

	4	2	15%	3	6	
Supplier B	1	5	20%	4	20	57
	2	4	15%	3	12	
	3	4	20%	4	16	
	4	3	15%	3	9	
Supplier C	1	2	20%	4	8	n/a (fail)*
	2	1	15%	3	n/a	
	3	2	20%	4	8	
	4	2	15%	3	6	

\* 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 30)
Supplier A	350	$350/350 = 100\%$	$100\% * 30 = 30$
Supplier B	700	$350/700 = 50\%$	$50\% * 30 = 15$
Supplier C	250	n/a	n/a

### Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
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Supplier A	43	30	73	1
Supplier B	57	15	72	2
Supplier C	n/a	n/a	n/a	n/a

# Part 3: Response Form

Framework:	[insert]
Project Title:	[insert]
ProContract Identification Number:	DN [insert]
Supplier:	[insert]
Date:	[insert]

## 1. Resource and Pricing Schedule

Excel spreadsheet to be embedded by Supplier in response

[enquiries@homesengland.gov.uk](mailto:enquiries@homesengland.gov.uk)

0300 1234 500

[gov.uk/homes-england](https://www.gov.uk/homes-england)