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Making homes happen

## Multidisciplinary Framework Invitation to Tender (Stage 3)

South West Rugby

Issue Date: 14/11/2022

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# 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 multi-disciplinary 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 masterplanner is being appointed separately to work with the appointed multi-disciplinary consultant in the preparation of masterplans, design codes, and designs of grey, blue and green infrastructure and any other supporting information required for the application(s). The appointed consultant will provide all planning and technical support required for the preparation submission and discharge of the outline planning application(s).
5. Please note that this multi-disciplinary commission excludes the ecology, masterplanner and landscape requirements as these are being appointed separately.
6. Homes England anticipates that bidders will put together a bespoke team of leading practitioners/ disciplines leads to meet the specific requirements of this brief. A bespoke team is required but does not necessarily have to comprise specified multi-disciplinary subconsultants.

## Purpose of commission

7. The purpose of this Further Competition Invitation to Tender (ITT) is to award the call-off contract for the above commission.
8. 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.
9. This Further Competition ITT is divided into 3 parts:

### **Part 1 – Commission Requirements**

- 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**

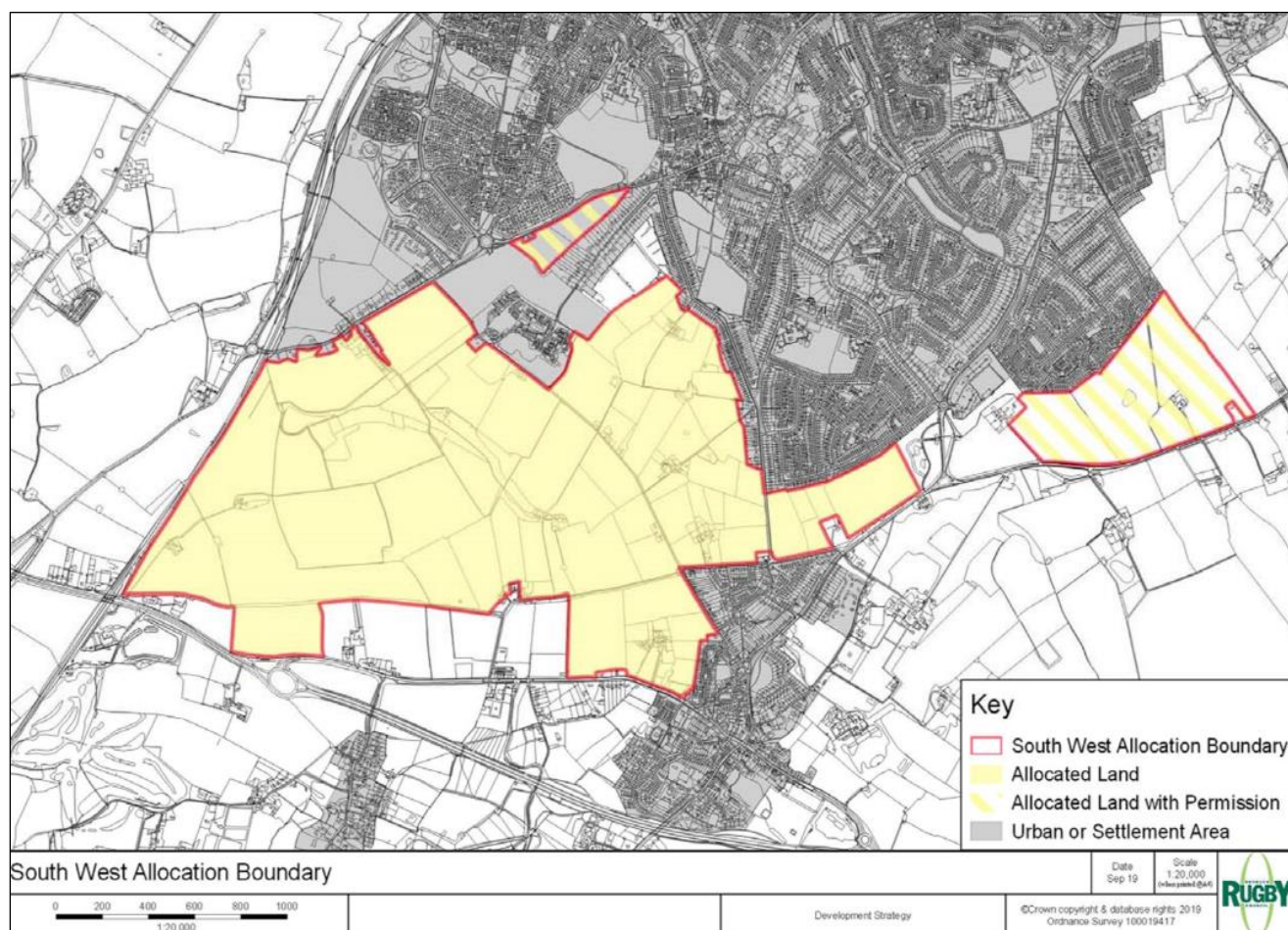
- Contains the standard forms required to be completed and returned by the Supplier when submitting a tender response.

# Part 1: Commission Requirements

## 1. Site Background

- 1.1. 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.
- 1.2. 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*

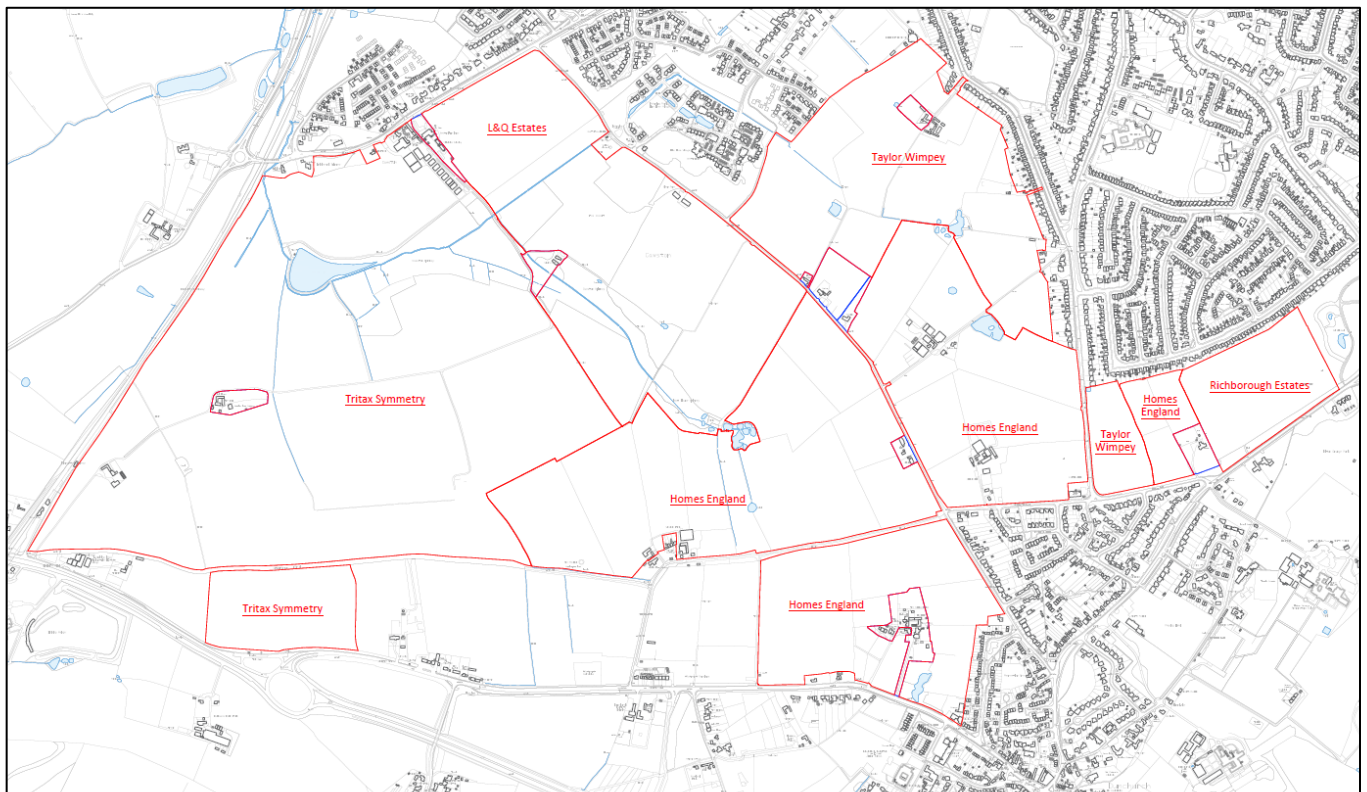


- 1.3. Comprehensive development had stalled on the site due to a range of factors including significant upfront infrastructure requirements, the complexities of an agreed mechanism to recover the costs of enabling infrastructure and the involvement of multiple landowners/promoters.
- 1.4. The requirement 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, strategic utilities, and community infrastructure.

- 1.5. 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.
- 1.6. 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.
- 1.7. The Collaboration Agreement, site wide 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 multi-disciplinary consultant.
- 1.8. 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*



## 2. Planning Status

- 2.1. 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.
- 2.2. 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.
- 2.3. 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.
- 2.4. 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.
- 2.5. 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.
- 2.6. The remainder of the site is being progressed by numerous other private landowners and promoters (Taylor Wimpey, Tritax Symmetry, L&Q Estates and Richborough Estates) and by Homes England.
- 2.7. 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.

- 2.8. 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. Homes England's role at SW Rugby

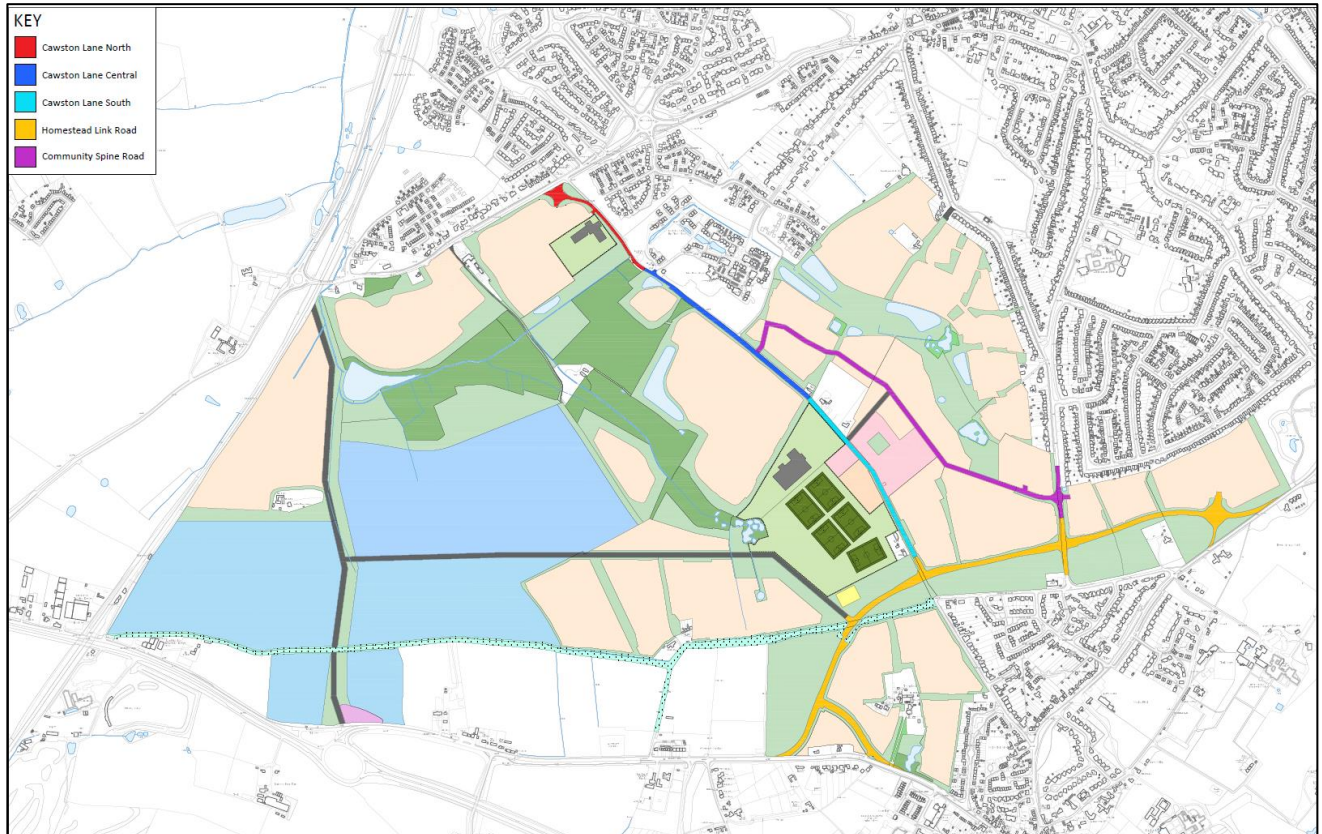
- 3.1. Homes England has a dual role at SW Rugby SUE, as both Master Developer and landowner, which is reflected in the requirement in this commission.

#### Master Developer Role

- 3.2. 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 Masterplan and Strategic Infrastructure Delivery Plan that provides a basis for the phasing of the project.
- 3.3. 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.
- 3.4. Items 1 and 2 are progressing well and the consultant team are already appointed for these works.
- 3.5. A highways designer has already been appointed to design the scheme for Item 3, but the appointed multi-disciplinary consultant will be expected to prepare the planning application and take the scheme through the technical approval process and support the delivery of the works.
- 3.6. 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).



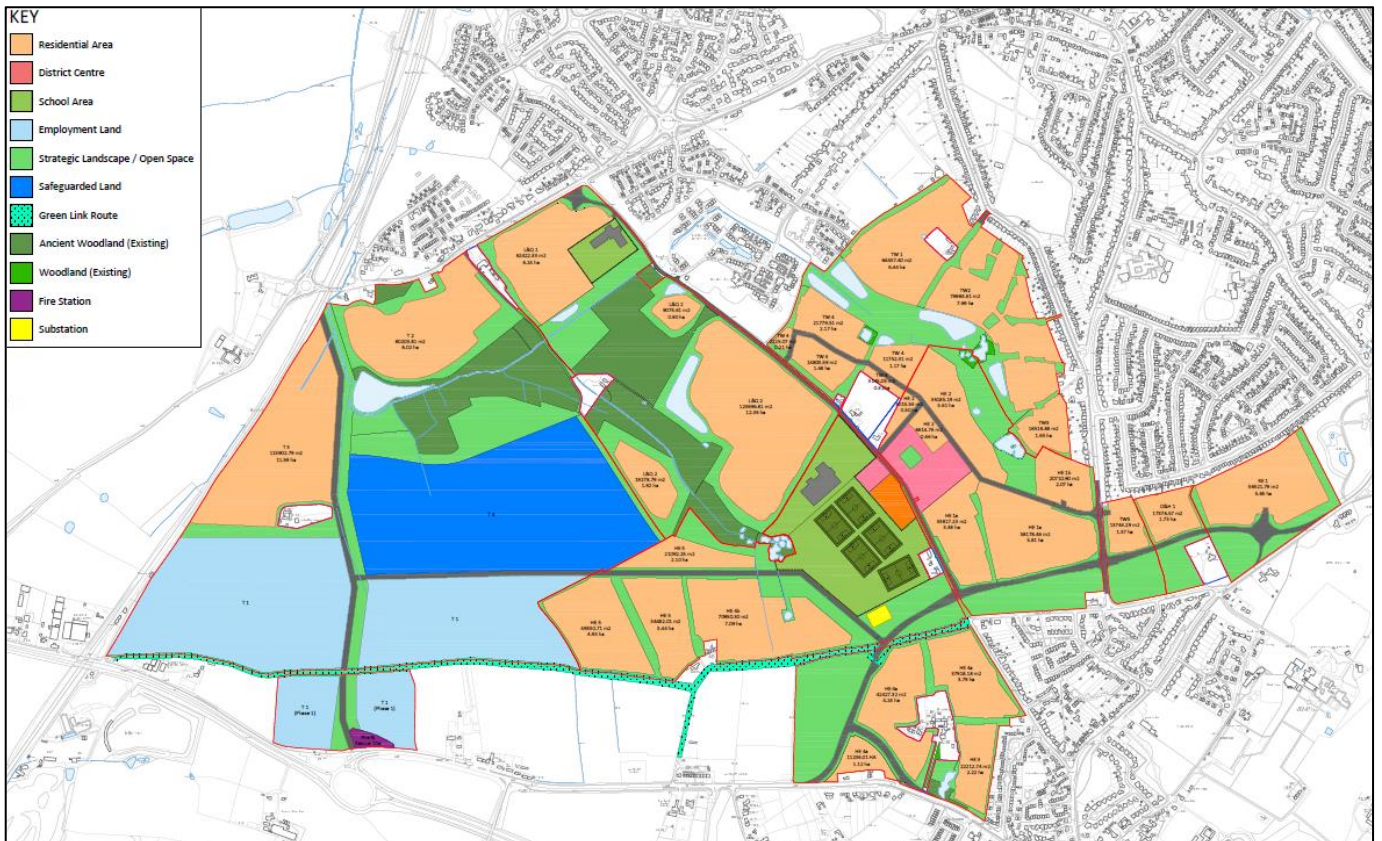
Figure 3 -South West Rugby development parcels



### Landowner Role

- 3.7. As landowner, Homes England is seeking to maximise housing delivery and supporting community uses on the 95.61ha of land in its ownership.
- 3.8. The Site Wide Masterplan is provided at Figure 4 below (with a larger version 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.
- 3.9. 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. The phasing and delivery strategy will be re-tested during the outline application and whilst developing the disposal strategy. It could be subject to change. Ensuring a flexible Outline Planning Permission will be critical to allow for future market changes and demand, and emerging disposal strategies.

Figure 4 -South West Rugby development parcels



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

**Parcel HE1a**

- 3.12. 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**

- 3.13. 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

- 3.14. 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

- 3.15. 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

- 3.16. 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

- 3.17. 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

- 3.18. 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

- 3.19. 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

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

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

- 3.21. 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.

## 4. Homes England's Objectives

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

- Continuing to develop a strong Vision for the future of a new sustainable community at South West Rugby, using the work done to date on Place Based Priorities (working closely with Warwickshire County Council, Rugby Borough Council, and other key Stakeholders), the history of the area, and unique characteristics of the site and communities/future communities;
- Developing a "place pledge" linked to the above Vision and Place Based Priorities;
- Ensuring the creation of Social Value throughout all Homes England activity at South West Rugby;
- Securing the delivery of high quality and affordable homes, faster, at South West Rugby;
- Ensuring high quality Place Making principles are adhered to, and responds to Government priorities for places that are beautiful and sustainable
- Drive value for money and efficiencies in project delivery;
- Lead an ambitious and commercial approach to the delivery of SW Rugby that delivers the Vision;
- 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);
- Ensuring compliance with all legal and statutory obligations applicable to the delivery of the project 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.

4.2. 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.

## 5. Objectives of this commission

5.1. The key objectives of this commission include:

1. To work with the masterplanning and landscape consultant within the context of the existing Framework Masterplan, to deliver the high quality, sustainable and accessible development which enables opportunity for all;
2. Help to drive high quality development across Homes England landholdings and work with key partners including Consortium members, to enable a comprehensive approach to site wide development as planning applications come forward;
3. Support the project team to maximise the value and housing potential of the site, through effective parcelisation of Homes England's land;
4. To support the development of a robust and deliverable phasing strategy for the development parcels within the area identified for this appointment;

5. To ensure implementation of an infrastructure delivery plan that ensures the delivery of key items of infrastructure (green/blue/grey/social) in the right place, at the right time, and which is “right first time”, and represents good value for money within budget;
6. Ensure consistency with National and Local Planning Policy (adopted and emerging);
7. Support the preparation of market facing planning application(s)/ deliverable schemes to support the disposal of Home England’s land;
8. To prepare relevant supporting evidence for outline planning application(s) and technical packs for disposals (for the first 2 disposals). Including the provision of various supporting statements/studies that would be necessary for this type of development as set out in local and national planning policy and guidance and the Council’s own validation requirements;
9. To prepare documentation to support effective stakeholder and community engagement;
10. To support the project team in the land disposal and developer selection process including review and scoring of submitted schemes;
11. To ensure that key project and Agency objectives relating to community engagement, social value, equality and diversity are embedded within the project at every stage.
12. Project manage and co-ordinate the necessary specialist inputs into an outline planning application.

## 6. Services and key deliverables

- 6.1. Suppliers should provide a fee quote for each of element of The Services listed below.

### CDM / Principal Designer Role

- 6.2. The MDD is expected to provide principal designer support to the project to ensure that the Homes England complies with its statutory responsibilities as project originator and client under the Construction (Design and Management) Regulations 2015 and its general duties under the Health and Safety at Work etc Act 1974.
- 6.3. Please note that a CDM / Principal Designer support has already been appointed on the Homestead Link Road so this appointment relates to the wider Homes England land holding.

### Scope

- 6.4. To undertake the duties and responsibilities of principal designer and designer as specified in the Construction (Design and Management) Regulations 2015, in particular, Regulation 8 – General duties of designers and principal designers; Regulation 9 – Duties of designers; Regulation 10 Designs prepared or modified outside Great Britain; and Regulation 11 Duties of designers in relation to health and safety at the pre-construction phase. The Agency standard specification is included at **Appendix 3** (or any variation of this as may change from time to time, subject to contract variation mechanisms).
- 6.5. Provide project specific health and safety advice to the client (Homes England project manager) on its duties to ensure that arrangements are maintained throughout the duration of the project to manage health and safety, up until the point the client role has transferred to the developer or developer partner. (Regulation 4).
- 6.6. Seek the cooperation of and cooperate with other duty holders. This includes Homes England project managers, masterplanners, designers and site agents involved in the project so far as necessary to enable them all to perform their duties under the regulations. This will include:

- Attendance at initial outline meetings to advise of the CDM requirements and see that adequate arrangements for the identification, collection and sharing of pre-construction information and site hazards; and
  - Liaising with duty holders on site masterplans, development briefs and other work which constitutes design work.
- 6.7. On behalf of the client (Homes England project manager), collate and assess the adequacy of the pre-construction information e.g. asbestos surveys, which will form part of the technical pack; identify any gaps and advise the client (Homes England project manager) on how the gaps can be filled; and provide the information promptly, including any additional information, in a convenient form to designer(s), masterplanner(s) and appointed developer(s) or being considered for appointment.
- 6.8. Before the award of the development and/or before any arrangements are made to transfer the site to the developer or developer partner:
- Check that the preferred developer is registered and compliant with a pre-qualification scheme which is a member of SSIP (Safety Schemes in Procurement) and advise the Homes England Project Manager accordingly of any developer who is not a member of a SSIP approved scheme; and
  - Advise the Client (Homes England Project Manager) on the suitability of the preferred developer in respect of their skills, knowledge and experience to undertake the development works (Regulation 8).
- 6.9. Confirm to the Client (Homes England project manager), through regular written updates and /or progress meetings, compliance with the Principal Designer's duties under Regulations 11 and 12. (Regulation 4(6a)).
- 6.10. As part of your tender response, you will be required to:
- Outline your experience, skills and organisational capabilities to discharge the Principal Designer duties under The Construction (Design and Management) Regulations - (CDM 2015) to deliver the project.
- 6.11. We also request that you highlight how you would implement arrangements to meet the "Principal Designer" duties under the CDM 2015.
- 6.12. Due to the scale of the project, we also recommend that, as Principal Designer, you are able to demonstrate how you encourage co-operation, co-ordination and communication between Designers (and anyone else).

## Site Wide Strategies / Investigations

### Ground Investigations

- 6.13. A Site Investigation has been prepared to provide information to assess the geotechnical, geo-environmental, geological and or hydrogeological ground conditions for proposed development. However, the site investigation was primarily aimed at providing information for:
1. The detailed design of the Homestead Link Road. It investigated the potential for contamination and geotechnical testing was carried out. It also investigated the current road build up and provided information (via soakaway testing) for infiltration drainage. The investigation is forming the basis of the detailed design and construction of the Homestead Link Road.

2. Additional locations were added across the wider South West Rugby Development to inform the MMP for the wider development and therefore in each field there was at least one additional trial pit and a window sampling borehole.
  3. Shallow soil sampling was also undertaken across the wider development and included locations beyond the wider development boundary to inform decisions on how the soils can be reused for planting and seeding design.
- 6.14. A copy of the Site Investigations undertaken to date is provided at **Appendix 4**.
- 6.15. The Multi-Disciplinary consultant is requested to carry out the design, procurement and supervision of the further Ground Investigation (GI) required for the Homes England land excluding the land within the red line boundary of the Homestead Link Road application. As part of this role, the Consultant is required to ensure all H&S requirements are met, including the provision of necessary information (such as pipes, wires, cables etc) provided to any subconsultants prior to works on site. Also to arrange site access with the Homes England Estate Management team in accordance with Agency protocols (including Site Access Request Forms and Risk Assessment/Methodology) as needed.
- 6.16. The outputs should include both factual and interpretative reporting to provide information for bidders for the site and to inform the viability assessment (e.g. identification of ground abnormalities). The GI shall provide information to inform a geoenvironmental assessment and to provide geotechnical information to inform a preliminary engineering assessment, including choice of foundation type. The scope of the GI is expected to comprise a combination of boreholes and trial pits, including soakaway tests to inform the drainage strategy.
- 6.17. The appointed consultant shall directly employ a ground investigation contractor and shall identify the proposed GI works costs separately from the consultant's fees (using the Resourcing and Pricing Schedule worksheets). Details of the scope of the proposed ground investigation works shall be provided, including type and depth of exploratory holes, field testing, gas/groundwater monitoring and laboratory testing.
- 6.18. The Site Investigations should be undertaken in a coordinated manner and should be aligned with the Archaeological Trial Trenching so that the two sets of intrusive works are undertaken back-to-back so that disruption to tenants on the site is limited to one continuous period of works.
- 6.19. We anticipate the Site Investigations and Archaeological Trial Trenching being undertaken between April-June 2023.

#### Earthworks / Cut and Fill Strategy

- 6.20. The Multi-Disciplinary consultant is requested to quote for the preparation of a cut and fill strategy dealing with earthworks on the site including topsoil. The strategy should focus on Homes England's landholding excluding the Homestead Link Road red line boundary (as cut and fill within this area is managed within its own boundary). However, the appointed consultant may need to discuss the arrangements for dealing with surplus topsoil with the team appointed for the Homestead Link Road.
- 6.21. The consultant will need to allow for the coordination of the strategy and creating and updating a model. In addition, and as a potential future contract variation (with a provisional sum to be included within the Tender response of up to £10k), there may be a requirement for liaison with other Consortium members (particularly Taylor Wimpey and L&Q) in respect of cost effective/good value for money solutions for either the delivery of the earthworks strategy or for dealing with surplus Fill.

## Archaeological Geo-Phys and Trial Trenching

- 6.22. The Multi-Disciplinary consultant is required to quote for the services including a geophysical survey to support the development of design detail and to allow for development of a full scheme of investigative mitigation. The results of the geophysical survey will feed into the design of a trial trenching evaluation to be carried out subsequently.
- 6.23. A geophysical survey and trail trenching for the area within the red line boundary for the Homestead Link Road has been procured separately as this is required for the planning application for the link road.
- 6.24. The area of the site which we would like consultants to quote for relates to the wider Homes England land holding (excluding the Homestead Link Road red line boundary).
- 6.25. Should any additional land be required to be the subject of a survey, a specific contract variation and sum is to be agreed at that time (and subject to a value for money assessment by the Agency, which could include securing competitively tendered quotes from other Suppliers).
- 6.26. The quote should include (but not limited to) the following:

### *Scope*

- Produce a Written scheme of Investigation for a magnetometry survey for Homes England's land holding (excluding the Homestead Link Road red line boundary).
- Allow a fee for the County Archaeologist to input into the Written Scheme of Investigation.
- Carry out the Geophysical survey, manage the survey works, and provide the results and final report to Homes England.
- Provide raw data as well as pdf report.
- Provide an initial programme for when the geophysical survey can be undertaken and the report written.

### *Allow for*

- Site visit to assess conditions for survey – crop heights etc. Fields will only be viewed from publicly accessible highways and footpaths.
- WSI to be reviewed by County Archaeologist.
- RAMS and associated documentation (Site Access Request Forms etc) to be produced and reviewed by the Client.
- OS MasterMap base mapping will be provided by the Client.
- Topographical survey can be provided if required.
- Kml files showing access points to fields will be provided by the Consultant.
- Greyscales to be provided to the Consultant within 4 weeks of survey completion.
- Report must be produced within 6 weeks of survey completion.

### *Assumptions*

- Quote based on continuous land access provided by the Client.
- Assume no livestock will be present.
- Provide any required security and H&S equipment and information as needed.



- 6.27. Please add any key areas you think may be missing from the above steps in your quote.
- 6.28. As per our comments on the Site Investigation, we expect the Archaeological works to dovetail with the Site Investigation works with both being undertaken between April and June 2023.

### **Planning Application 1: Cawston Lane and Community Spine Road**

#### Delivery Programme

- 6.29. There is an imperative to commence the commission to meet the Agency's business plan objectives and the targets agreed with the consortium. The indicative delivery programme for Cawston Lane and the Community Spine Road is as follows:
- Full planning application to be submitted: 31 August 2023;
  - Permission granted: 31 January 2024;
  - Technical approval: 31 May 2024;
  - Discharge of any necessary Planning Conditions (any pre-commencement conditions by Start on Site):
  - Contractor appointment: 31 August 2024;
  - Start on site: 31 October 2024;
  - Complete: 31 October 2025; and
  - Adopted: 31 October 2026.

#### Services Required

- 6.30. We are seeking responses to this ITT to provide transport planning and engineering services to secure the planning and technical approvals to facilitate the delivery of the Cawston Lane and Community Spine Road works and all associated infrastructure pre-contract, through construction and defects and adoption. It is intended that this commission will be awarded in stages.
- 6.31. Due to the need to maintain the programme, a highways designer has already been appointed to progress the design and the planning drawings for the highways scheme only.
- 6.32. The appointed consultant will be expected to progress the planning application working with the design for the highways scheme, including all necessary supporting information.

#### *Stage 1*

- 6.33. To undertake the following tasks:
- Transport planning and modelling;
  - Sustainable and active transport principles to be considered and opportunities identified (including engagement with potential bus operators and/or On Demand service providers), linked to the development of a Strategic Travel Plan for the Outline Planning Application (District Centre and Agency residential parcels);
  - Consideration to be given to the most appropriate location for a Co-Mobility Hub, assumed to be accessed off the Community Spine/Cawston Lane, and including some early market engagement with potential operators;

- Assist with gap analysis of currently held data and assisting with the preparation and management of any further site investigations and surveys noting the consultant will be expected to appoint survey and works contracts directly.
- Coordinate with utility works being designed by others and respond accordingly.
- Support the preparation, submission and determination of the planning application including preparation of materials for, and attendance at consultation events and pre-application meetings.

6.34. As the consultation strategy has not yet been finalised for the scheme, we recommend that you allow for a budget of £30,000 for public consultation activities within your budget estimate for this planning application.

### *Stage 2*

6.35. Prepare the following supporting application documents:

- Application forms and certificates;
- Planning Statement;
- Design and Access Statement;
- Transport Assessment;
- Environmental Statement;
- Archaeological Assessment;
- Flood Risk Assessment;
- Outline Drainage Strategy (with reference to the Site Wide Drainage Strategy produced for the site and utilising SUD's wherever possible)
- Geo-Environmental Desk Study;
- Ground Investigation;
- Historic Environment Desk Based Assessment;
- Health Impact Assessment;
- Statement of Community Involvement;
- Social Value Statement;
- Connectivity and Movement Plan;
- Landscape Design Principles;
- Utilities Statement; and
- Arboricultural Impact Assessment.

6.36. The ecological inputs into planning application will be completed by the ecological consultant who has already been appointed on the scheme.

### *Stage 3*

- Detailed design and tendering including the installation of drainage and other services and coordination with IDNO.
- Design of highways and associated infrastructure including (but not limited to) site clearance, enabling works drainage, bulk earthworks, lighting and green/blue infrastructure;
- To include advice on form of contract, production of the tender pack including all relevant tender and contract documents, manage the procurement of the works contract through Homes England e-tendering portal (Pro-Contract), appraise tenders, issue tender report with recommendation(s) for appointment; assist with internal tender approval papers and processes.

- Securing all approvals from the adopting authorities and safety audits.
- Acting as the Principal Designer under CDM 2015.

#### *Stage 4*

- Construction and Handover.
- Act as the Principal Designer under CDM 2015 and resident engineer providing site supervision during the works, managing defects and securing adoptions.

#### *Stage 5*

- Construction and Handover including the provision of H&S file and all as-builts.
- Acting as the Project Manager / Supervisor under stages 3 and 4.

#### *General requirements*

- Across all stages provide relevant information including but not limited to risk, health and safety reporting, programme and budget, including financial forecasting by Month for the forthcoming 12 months and annual indications beyond 12 months;
- Provision of illustrations and display boards for information sharing including but not limited to stakeholder and consultation events.

### **Planning Application 2: Outline Planning Application**

6.37. 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:

- Stage 1a: Baseline Review and Planning Strategy: to be completed within four weeks of instruction.
- Stage 1b: Masterplan Development: initial draft masterplan to be completed by end of March 2023.
- Stage 1c: Public consultation and Community Engagement: ongoing February – December 2023.
- Stage 1d: Masterplan testing and refinement: April 2023- December 2023.
- Stage 2a: Pre-application: ongoing April 2023 – December 2023.
- Stage 2b: EIA Scoping: August/September 2023.
- Stage 2c: Preparation of planning application: December 2023 – March 2024.
- Stage 2d: Planning application submission to determination: March 2024- September 2024.

6.38. Details of these stages and the expected services are outlined below.

#### Stage 1: Developing the masterplan

##### *Stage 1a: Baseline Review and Planning Strategy*

6.39. Review of baseline data, work in progress and existing information and identify which reports need to be commissioned / updated.

6.40. Prepare a planning strategy report setting out the recommended approach to securing outline planning permission for the site.

### *Stage 1b: Masterplan Development*

- 6.41. Work with the appointed masterplanner and property consultant, to continue to develop the Vision for South West Rugby with the community and stakeholders. To use the existing Site Wide Framework Masterplan, Vision and Principles as the basis to produce an evidence based, and commercially successful and viable detailed Development Site Masterplan and Design Code (in accordance with the National Model Design Code and guidance relating to engagement with communities in the development of Codes)) that maximise the value, deliverability, quality and housing potential of the site. A BfHL pre-assessment process will also be required to ensure that ultimately the developer schemes comply with both the Design Codes and are capable of scoring well against BfHL criteria.
- 6.42. Lead on and design the highways scheme for the remainder of Cawston Lane (identified as Cawston Lane South on the plan at Figure 4 above). This is likely to be an iterative process working with the masterplanner, given the relationship between Cawston Lane and the schools and district centre to the east and west.
- 6.43. Lead on and design the highways scheme for the Sustainable Transport Corridor (which connects the Homestead Link Road in the east to the Potsford Dam Link in the west running through parcels HE4b and HE5). This is likely to be an iterative process working with the masterplanner.
- 6.44. Develop a robust and deliverable phasing strategy for the development parcels working alongside Homes England's appointed masterplanner and property consultant.
- 6.45. Work with the masterplanner 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 and green travel opportunities, principles of the 20 minute neighbourhood, biodiversity corridors, biodiversity net gain potential and public open space connectivity.

### *Stage 1c: Public consultation and Community Engagement and Activation*

- 6.46. 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 review the consultation material prepared to date and provide a public consultation and strategy in collaboration with Homes England.
- 6.47. For the purposes of your quote, we suggest that you allow for a budget of up to £75,000 for public consultation and community engagement activities inclusive of preparing a strategy, preparation of materials and attendance at events including formal public consultation and informal engagement activities.
- 6.48. 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."*



6.49. 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 1d: Infrastructure Delivery Plan*

6.50. Building upon the initial draft Infrastructure Delivery Plan (see **Appendix 5**), provide:

- A review of, and strategy for, the integration of services being brought in as part of the wider site development works (such as power, water and telecoms).
- Identify the infrastructure requirements to support the wider site development, including a Utilities Study identifying any network reinforcement requirements, timing of such, and associated costs;
- Assessment of infrastructure requirements and connections with the core site, including concept design, testing, phasing, costing and preparation of an Infrastructure Delivery Plan.
- Support the preparation of an indicative cost plan to take account of all build costs and infrastructure requirements and refine in conjunction with the Project Manager to feed into the overall site cost plan (and valuations/disposal processes) Cost Value engineering to be embedded throughout the project delivery.

- A Haul Roads/Routes Strategy and Construction Management Plan, alongside a Parcel Developer “Rules/Playbook”.

*Stage 1e: Masterplan Testing and Refinement*

- 6.51. Working with Homes England’s appointed masterplanner and property consultants, 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:
1. Sustainability of the scheme;
  2. The value and housing potential of the site in the context of the wider SWR SUE;
  3. Scheme viability;
  4. Achievement of Homes England policy objectives set out in Homes England Strategic Plan around MMC, SMEs, Custom Build/Self Build, and tools including Building for a Healthy Life and Building with Nature.
- 6.52. 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 1f (but to be developed concurrently with the stages above): Sustainability Strategy*

- 6.53. A Sustainability Strategy setting out a potential route map towards NetZero, Sustainable Energy Strategy, and whole life-cycle carbon reduction strategy. The Agency is currently developing its approach to Sustainability through its Strategic Plan, and a set of KPI’s are being agreed with Government. The Homes England Strategic Plan and KPI’s, once published (anticipated during 2022/early 23), will be used as the foundation for the Sustainability Strategy. Innovation, Technology and Cost/Value evidence/assumptions will be important elements of this work.
- 6.54. There may be further requirements to engage in workshop sessions with other government departments, such as EA, BEIS and DfE, during the development of the project. Up to 5 x ½ day workshops should be priced for within this tender.
- 6.55. The Consultant may also be requested to commission a “critical friend” review of the OPA/Codes by Sustainability West Midlands, with a provisional sum allocation of £10k plus a % project management fee.

Stage 2: Pre-application and application submission

*Stage 2a: Pre-application*

- 6.56. The appointed consultant will be expected to lead on pre-application discussions with Rugby Borough Council and Warwickshire County Council and other key stakeholders.
- 6.57. 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.
- 6.58. We will also be seeking the views of Design Midlands on the masterplan. 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 2b: EIA Scoping*

6.59. The appointed consultant will be expected to lead on the preparation of and submission of an EIA Scoping Opinion request and a fee should be provided for this.

*Stage 2c: Preparation of Outline Planning Application(s)*

6.60. Prepare the following supporting application documents:

- Application forms and certificates;
- Planning Statement;
- Design and Access Statement;
- Transport Assessment;
- Environmental Statement;
- Archaeological Assessment;
- Flood Risk Assessment;
- Outline Drainage Strategy;
- Geo-Environmental Desk Study;
- Ground Investigation;
- Historic Environment Desk Based Assessment;
- Health Impact Assessment;
- Statement of Community Involvement;
- Utilities Statement;
- Arboricultural Impact Assessment;
- Travel Plan;
- Energy Statement;
- Sustainability Checklist; and
- S106 Heads of Terms.

6.61. And any other documents that you consider to be relevant.

6.62. The ecological inputs into the scheme, including surveys, ecological assessments, EIA chapter and BNG assessments are already covered by an existing consultant appointment.

6.63. In addition, the landscape inputs in terms of LVIA and the landscape chapter of the EIA will be covered by a separate appointed (included within the masterplanner appointment).

6.64. Notwithstanding the above, your fee for the Environmental Statement should include the review of the chapters prepared by external parties and editing to ensure that a consistent approach to the EIA is taken a coherent Environmental Statement is prepared.

6.65. As part of the above, a baseline package of evidence and report should be prepared to support any future defence of Part 1 or Section 10 claims as part of the comprehensive suite of surveys required to support the planning application and any additional surveys deemed necessary to produce the required report.

### *Stage 2d: Application submission and post submission*

- 6.66. Include a quote for the submission of the application and post submission work. Given that this is an unknown at this stage, we recommend that you allow a budget of circa £2,000 a month for a 12-month period to cover any additional actions required post submission.
- 6.67. Advice will be required on discharge of conditions, but this will be secured at an hourly rate once the conditions and inputs required are known.

### Stage 3: Post determination

#### *Stage 3a: Detailed design for highway works*

- 6.68. In respect of Cawston Lane South, and the Sustainable Transport Corridor, to provide:
- Detailed design and tendering.
  - Design of highways and associated infrastructure including (but not limited to) site clearance, enabling works drainage, bulk earthworks and lighting.
  - To include advice on form of contract, production of the tender pack including all relevant tender and contract documents, manage the procurement of the works contract through Homes England e-tendering portal (Pro-Contract), appraise tenders, issue tender report with recommendation(s) for appointment; assist with internal tender approval papers and processes.
  - Securing all approvals from the adopting authorities and safety audits.
  - Acting as the Principal Designer under CDM 2015.
- 6.69. Homes England may require support following the technical / detailed design stage through the construction stage of the highway works and may ask for proposals from the appointed consultant for this work in the future. However, for the purposes of this ITT, no fees are required for works beyond detailed design stage.

#### *Stage 3b (but to be developed concurrently with the stages above): Long term Stewardship*

- 6.70. Consider long term stewardship vehicles and adoption of all social, economic and engineering infrastructure elements (inc. public realm, greenspace, SuDS drainage etc.) providing a strategy including the following:
1. GIS mapping and register of all infrastructure elements.
  2. Recommended approach to long term stewardship of each element.
  3. Risk of possible non-statutory adoption of each element and alternative options.

### Stage 4: Disposals

#### *Stage 4a: Full pricing schedule for the first parcel disposal*

- 6.71. During the initial 3-year contract period, it's anticipated there will be at least one Agency disposal; Work is on-going to review phasing and disposal strategies in respect of market conditions, and this will identify where development will take place in the short-term; particularly dependent on infrastructure delivery. Whilst a property consultant will be appointed to lead on the marketing and disposal of the parcel, the MD consultant will need to undertake the following tasks:



- Input into writing DPS Invitation to Tender on technical matters.
- Prepare a comprehensive DPS technical pack for disposal, identifying key documentation that will inform developer bids/ submissions. The scope of a typical technical pack is outlined at **Appendix 6**.
- Undertake any additional surveys in relation to Agency land, that will assist with the disposal and form part of the technical pack. Provide an approximate cost for topographical surveys at parcel level.

*Stage 4b: Indicative lump sum for disposal work (to be kept under review and agreed at the relevant time in accordance with tendered rates, unless otherwise agreed between Homes England and Consultant)*

- 6.72. As part of the marketing and disposal process, the MD Consultant (working with the masterplanner/urban designer) will need to support the briefing process with bidders, in respect of technical matters – including input into clarification responses where necessary and inputting into the evaluation process in respect of technical deliverability, cost assumptions and risk.
- 6.73. When a preferred bidder is identified, support may be required to draft the Gateway approval paper; allocate 2 days of resource for this. Support will also be required to deal with enquiries up until the Agency enters into conditional contract with the bidder; 2 days of resource should be allocated for this.
- 6.74. Support will need to be given to the project team and developer in refining their Reserved Matters submission/ detailed scheme, to reflect pre application advice. This should be done via workshops (assume 2 days) and written feedback. Also, to provide support through RM determination period as needed, ensuring planning conditions are deliverable and reasonable.

#### Additional Services: A Local Centre Design and Development Brief

- 6.75. The proposed District Centre for the development falls within Homes England ownership and this area of land, along with all proposed community land use, will be managed and coordinated as part of the Homes England enabling role. Long Term Stewardship and Placemaking will play a large part in the evolving proposed land uses that form part of the District Centre and a potential Community Hub (Deeley Parcel); the latter are smaller areas of community and commercial uses.
- 6.76. Such design will be to Block Plan stage (prepared by the Masterplanner) and will require specialist design around education and healthcare uses. This will also include DfE Guidance BB103 and safeguarding requirements for Education, with Health Care related design guidance as relevant.
- 6.77. Space Syntax as part of their role in assisting Homes England may also be required to carry out a review/modelling of the connectivity of the District Centre as part of its commission, working with the Masterplanner appointed to develop the Block Plan design for the District Centre, and key movement connections and locations of uses.
- 6.78. The Agency reserves the right to commission/not to commission, this specific work in relation to a Design and Development Brief (to Block Plan level and including servicing arrangements – utilities and commercial servicing), to be produced collaboratively with the Masterplanner/Urban Designer with input on uses, market and disposal strategy from the appointed Property Consultants.
- 6.79. For the purposes of this ITT and tender, a specialist with experience of delivering Local Centres and Community Facilities (including Education - DfE Guidance BB103 and safeguarding requirements for Education, alongside

Health Guidance for any development of health land use as part of the development of the District Centre) will need to be identified, given the importance of the Local Centre in terms of place making and value creation, S106 obligations, and the need to incorporate a diverse range of commercial and community uses, alongside residential development.

- 6.80. For pricing purposes bidders should include a provisional sum of £30,000 for this work, and the scope will be reviewed, and instructions confirmed during the course of this instruction. The Agency retains the right to competitively tender this work if deemed necessary at the time.

#### General Requirements

- 6.81. Project management for the commission and a collaborative approach to other Homes England appointed consultant team and external stakeholders. Including attendance at client meetings and fortnightly update reports.

## 7. Site and supporting Information

- 7.1. Suppliers should familiarise themselves with the attached plans and documents:

1. SW Rugby Landownership Plan – Appendix 1.
2. Site Wide Framework Masterplan – Appendix 2.
3. CDM/Principal Designer Role – Standard Specification – Appendix 3.
4. HLR Site Investigation – Appendix 4.
5. Infrastructure Delivery Plan – Appendix 5.
6. Typical Technical Pack – Appendix 6.

## 8. Indicative Programme

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

Key Delivery Milestones	Anticipated Date
Issue Invitation to Tender	14/11/2022
Submission Deadline	16/12/2022
Selection of Preferred Bidder	09/01/2023
Commencement	23/01/2023

## 9. Management

- 9.1. 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 – Project Lead);
  - Raj Sanghera (Head of Planning and Enabling – Infrastructure/Technical Lead);
  - Allert Riepma (Head of Disposals);
  - Ben Frodsham (Senior Planning and Enabling Manager – Project Manager);
  - Steve Dawson (Senior Development Manager and Disposal Lead)
  - Andrew Carter (Senior Planning and Enabling Manager);
  - Chris Sharpe (Senior Planning and Enabling Manager);
  - Beth Lautman (Planning and Enabling Manager); and
  - Natalie Mortlock (Planning and Enabling Manager)
- 9.2. 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);
  - Jones Lang Lasalle (Property Consultants);
  - WSP (Site wide ecology);
  - TEP (Landscape consultants or the Homestead Link Road).
- 9.3. Homes England are also procuring for masterplanning and landscape consultants for the outline applications. The appointed multidisciplinary consultant will be expected to work closely and collaboratively with the appointed team once the procurement process for this stage of the project has concluded.
- 9.4. 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).

## 10. Invoicing and payment

- 10.1. 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 for review to ensure billing is appropriate and any overrun on fees does not occur.
- 10.2. 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.

## 11. Other Requirements

### Collateral Warranty

- 11.1. 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

- 11.2. Should performance during the period of this appointment prove unsatisfactory, 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.
- 11.3. 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

- 11.4. 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.
- 11.5. 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

- 11.6. 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.
- 11.7. 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

- 11.8. 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 16<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.
- 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

- 6.1. Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to Homes England. The evaluation criteria (and relative weightings) that Homes England will use to determine the most economically advantageous Tender are set out in Section 6 (Evaluation Criteria) below and the scoring approach is detailed in Section 7 (Worked Example). Scores will be rounded to two decimal places.
- 6.2. Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand, and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.
- 6.3. Award decisions will be subject to the standstill period if over the 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 CV's 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> Approach to addressing the requirements of the Commission	Statement outlining method and approach explaining how the commission will be undertaken Schedule of services to be delivered	20%



	<p><i>Maximum page limit = 10 A4 pages (minimum of 10-point font)</i></p>	<p><u>Proposed specific and measurable Key Performance Indicator's for the project;</u></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 of external influences and stakeholders</p> <p>Other commentary on the brief</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 = 5 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>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%
3	<p><b>Management arrangements</b></p> <p>Please identify 1 key point of contact for the day-to-day management of the instruction,</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>	20%

	<p>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 = 8 A4 pages (minimum of 10-point font)</i></p>	<p>Where subcontracting arrangements are in place, who will manage the contract?</p> <p>Communication strategy (client and other project consultants)</p> <p>Supported by relevant experience / examples where applicable</p>	
4	<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><i>Maximum page limit = 6 A4 pages (minimum of 10-point font)</i></p>	<p>Commitment to meeting the timescales outlined in the brief</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>	15%

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
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

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