



Homes
England

Development and Regeneration Technical Services (DARTS) Framework

Further Competition Invitation to Tender
(Stage 3 Over FTS Threshold / Stage 1 Under
FTS Threshold)

Axbridge Road, Cheddar

Issue Date: 25/01/2025

ProContract Identification Number:
DN702041



Introduction

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

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

This Further Competition ITT is divided into 3 parts:

Part 1 – Commission Requirement

- Details the commission requirements, Consultant Brief and other requirements.

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.

A PROJECT BRIEF

1. Commission background

Homes England is the government’s Housing and Regeneration Agency. The Agency’s new Strategic Plan 2023 to 2028 sets our mission and five strategic objectives:



Figure 1: Homes England's Mission and Objectives

The Axbridge Road site is in the Sedgemoor District, now combined into the unitary authority Somerset Council.

Hinkley Point C, with a peak workforce of 8,600 employees, is creating acute housing supply challenges, along with *Gravity*, a 616 acre 'Smart Campus' which is the site of a battery manufacturing plant for Jaguar Land Rover which will create c.9000 jobs. Housing affordability is an issue across the district due the relatively low supply of affordable housing and lower than average wages.

In acquiring the site, Homes England has engaged with the Council. They recognise the site as a long-term stalled opportunity with delivery challenges and have welcomed the Agency's intervention to accelerate delivery. This comes at a time when Somerset faces significant challenges around nutrient neutrality which is stalling sites, impacting the much needed delivery of new housing.

2. Delivery strategy

The site has outline planning permission for residential and some business use (May 2023), but the consent has implementation and marketability challenges, which the agency wishes to address through planning variations, alongside demolition of the existing buildings (slab removal TBC).

The site lends itself to disposal in two tranches with a care home plot and then the remaining land (including employment use/s) which could be sold to a housebuilder. Alternatively, a single disposal to a housebuilder, with a sub-sale for the care home plot, may be a more efficient route but may not yield the best financial return. In both scenarios, it is currently anticipated that the Agency would dispose of the site on a freehold basis rather than a building lease to the DPS.

It should be noted that the 3 year outline consent has resulted in a hard deadline (May 2026) to procure a developer who can then prepare and submit a Reserved Matters application in time to protect the permission. It is estimated that this process could take up to 20 months in total, although some time savings (TBC) could be made with a disposal on a freehold basis.

Please note that this strategy is provisional and may change as the project progresses.

3. High level objectives

Homes England's main objective is to de-risk the site and secure delivery of much needed new homes within Somerset.

The key outcomes, in line with the current planning consent, are:

- Delivery of a minimum of 91 homes, of which 13 are affordable
- A C2 care home with 72 bed spaces
- Employment floorspace (if demand can be proven)
- Nursery
- On-site public open space including a LEAP, trim-trail and wildlife areas
- improvements to local highways, sports fields and pedestrian greenways

4. Quality standards

As with all of Homes England's projects, we will be applying the Agency's strategic objectives (as set out in Section 1) and seeking to deliver, wherever possible, local and national policy requirements.

The delivery of the site will be geared towards meeting strategic objectives relating to quality:

- Promote the creation of **high-quality homes in well-designed places** that reflect community priorities by taking an inclusive and long-term approach; and
- Enabling **sustainable homes and places**, maximising their positive contribution to the natural environment and minimising their environmental impact

Homes England is aiming to deliver well-designed homes and places in line with Building for a Healthy Life, the National Design Guide and local design code, including:

- Integrated neighbourhoods with access to nature and amenities facilitated by walking and cycling and public transport;
- Distinctive places that reflect local character; and
- Streets, public space and blue and green infrastructure that are designed for people to use, easy to navigate and have a well-considered relationship between public and private spaces

The Building for a Healthy Life tool continues to be used with the design of Home England's sites and in its land disposal process, as a measure of the quality of residential development proposals. One of Homes England's core KPI's (#12) measures the share of supported schemes that meet or exceed the agreed standards for design quality.

Homes England is also aiming to deliver:

- More homes that are energy efficient, carbon efficient and resource efficient, both in-use and across their whole life;
- More energy efficient, carbon efficient and resource efficient places;
- Places that enhance the natural environment, including air and water quality, biodiversity and habitat; and
- Maximised use of Modern Methods of Construction in new homes, community and commercial buildings

The homes at Axbridge Road will be delivered from 2025 onwards and hence the Future Homes Standard will apply.

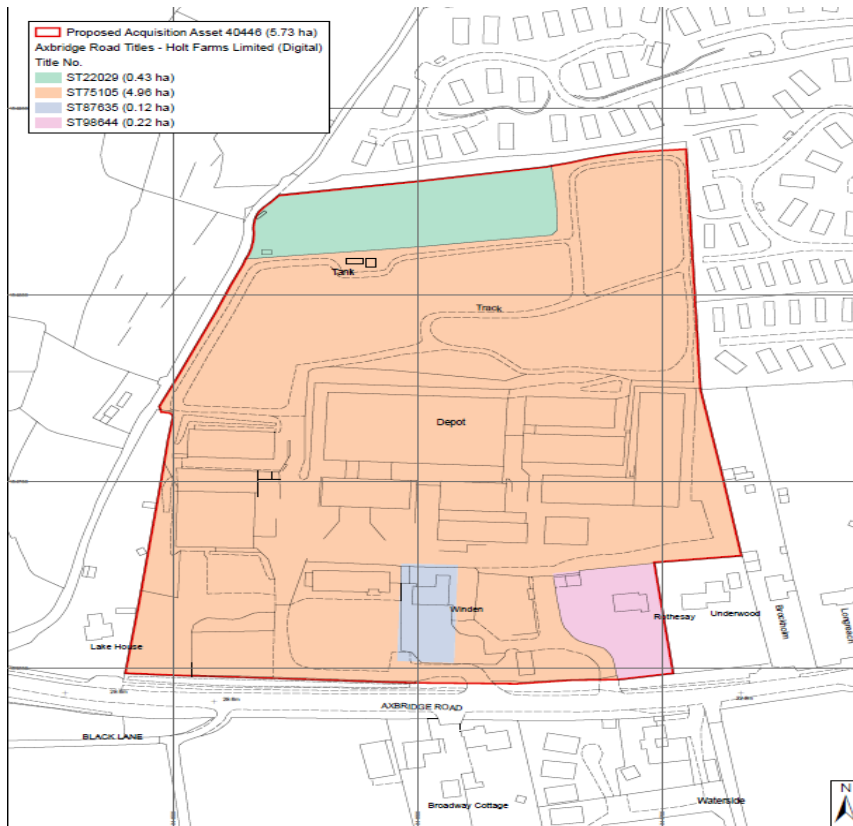
5. Site Information

Overview

The site is located to the north of the A371 Axbridge Road, midway between the centres of the Somerset towns of Axbridge and Cheddar. There is open countryside – the Mendip Hills AONB – to the north-west, west and south-west, low density residential to the south and south-east, and a holiday resort the east/north-east.

Aerial images of the site are below, but please note that Homes England has slightly increased the size of the site beyond the yellow boundary shown to the north by purchasing an additional wooded area in the Northwest corner – see Title Plan provided:





Land Registry Jigsaw Plan
 Proposed Acquisition
 Axbridge Road
 Chester



There are two vehicular access points at the southern boundary onto the A371. The site is bound on all sides by mature hedgerows and rises from south to north, by a total of 20 metres.

The north of the site is generally woodland with a water pumping station, including an assumed water tank, water pump and several external wells. The central area has c.12 single storey vacant sheds/warehouses, generally steel framed, with a mix of steel cladding and asbestos containing material (ACM) cement board cladding to the side elevations and roofs.

There are retaining walls locally across the site and to the building perimeters. To the south there is access for the previous supply chain site, two private dwellings and an agricultural shed.

Planning overview

There is an outline planning permission for development of the site, dated 31st May 2023, for the following:

‘Outline application with some matters reserved for the demolition of existing buildings and erection of a mixed-use scheme comprising up to 100 residential units (Class C3), up to 60 bedspaces care/retirement facility (Class C2), up to 12 bedspaces extra care facility (Class C2), up to 250 sqm nursery use (Class E (f)), up to 750 sqm business use (Class E (g)), and up to 5 live/work units (Class C3/E (g)), with ancillary works including landscaping, access, parking and circulation space’

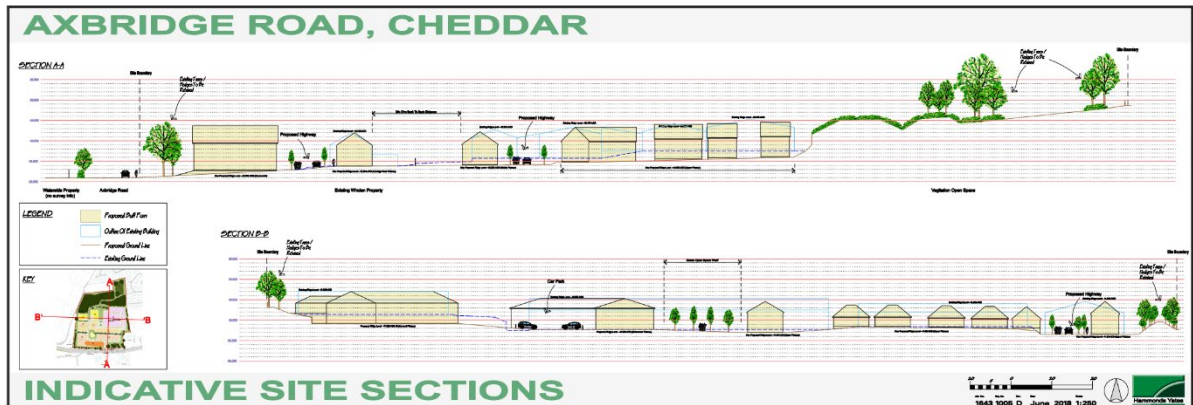
The application was submitted in 2018 and received resolution to grant in 2020. The Decision Letter and completion of the S106 agreement were delayed due to the prolonged site marketing process and lack of capacity at the Local Planning Authority.

A copy of the planning approval, signed S106 agreement, and all associated documentation is annexed to this ITT.

The approved parameter plan, and illustrative masterplan, are shown below:



The approved indicative sections are shown below:



There are 34 planning conditions, most of them standard for a residential permission of this size. One of the conditions (No 3) includes a requirement that development shall be carried out in accordance with the approved Parameters Plans which includes an Indicative Storey Heights (ISH) plan. This places a maximum building height restriction on the scheme and effectively limits the net saleable floorspace that can viably be achieved.

The S106 agreement requires 15% affordable housing (75% Social Rent and 25% Intermediate), and financial contributions totalling £914,385. It is also liable for CIL, which for an illustrative option prepared totalled £640,763.

It should be noted that the Parish Council opposed the planning application on the grounds that it is contradictory to the Neighbourhood Plan which seeks employment use protection for the site, and a similar policy in the Local Plan. Following the issue of the permission the Parish Council submitted an application for Judicial Review. However, this has now been dismissed.

The current planning permission is considered unsatisfactory from a commercial perspective and capable of improvement in the following areas:

- The current building height restriction, which will not allow an increase beyond the existing ridge heights of the warehouses, would result in inefficient housing typologies and floorspace. Under a S.73 variation, submitted with a suitably detailed Landscape Visual Impact Assessment (LVIA), it is considered that this position could be improved. It is understood that the current restriction was imposed due to an information gap in the planning application pack, rather than a fundamental objection or strict policy position
- There are some minor discrepancies between some of the approved plans. These are relatively minor matters but nonetheless will need to be ironed out through a S.73 variation in order that the planning permission is clear and unambiguous for onward site disposal to a developer
- Currently the location of the care uses is shown situated to the rear of the site on the illustrative masterplan which forms one of the approved plans. The market preference is to locate it towards the front of the site. The LPA consider this a straightforward change and can be dealt with under a S.73 variation
- Potential removal of employment use - the permission includes the provision of up to 750 sqm of business use (Class E (g) Offices & Research), for which there is no quantifiable demand in this location, being remote from urban amenities. It is expected that a well evidenced marketing campaign will need to be conducted over an appropriate duration to prove the absence of demand, and that a new planning application will be required in order to remove this element of the permission. This would be progressed by Homes England's developer. It should be noted that the employment use has been marketed by Yeo Valley's agent Savills, as part of the site disposal marketing, so there is a degree of pre-existing evidence upon which to build a case

It should be noted that, as part of the technical due diligence work undertaken at the acquisition stage, a capacity plan was produced which relocated the care home to the front of the site. It also included various improvements to the plan within the constraints of the current consent e.g providing bungalows with 1.5 storey heights in line with the ridge height restriction, and an optimum earthworks solution. This is closer to a marketable solution but is still capable of improvement as set out above. The plan is provided below, with two options – with and without employment use:

Homes England – Capacity Study Illustrative Layout (Option 1 – existing Planning Permission Compliant)



Homes England – Capacity Study Illustrative Layout (Option 2 – with removal of Class E(g) employment use)



Technical summary

Topography

Development needs to address significant level differences, whilst taking into account the impact on the landscape and views of the site, and provision of accessible 1:21 gradients. A topographical survey of the site has been undertaken (2018).

There are a number of retaining walls across the site, forming existing development plateaus, as well as a 1.5m tall king post concrete retaining wall to the northern boundary. Removal of the retaining walls, earthworks modelling and reprofiling of the site will need careful planning and sequencing, particularly to the northern and eastern boundaries where there is established woodland.

Although there is an outline planning consent the capacity of the site requires further investigation/validation as the illustrative masterplan shows development encroaching into the hillside to the north without consideration of the level changes that need to be accommodated.

In the context of existing site levels, the optimisation of retention/ re-use of soils (deemed geotechnically and environmentally suitable) will be a key consideration for development masterplanning.

Ecology

The site is ecologically sensitive. There are five statutory designated wildlife sites of international importance within 10 km of the site – Mendip Woodlands, Mendip Limestone Grasslands, North Somerset and Mendip Bats, Somerset Levels and Moors (SPA and Ramsar). There are also a further eleven statutory designated sites of international importance within 5 km of the site, including Cheddar Wood to the west.

Based on 2018 survey information and additional desk-based resources, the proposed development is considered to present risks to over 40 identified ecological receptors. In particular, these include Badgers (setts identified on site), Bats, Hazel Dormouse and Reptiles.

Proposed mitigation solutions, some of which have seasonal constraints, should be progressed as soon as possible to enable the demolition works to proceed. There are a number of ecological surveys required which are listed in detail under the required deliverables later in this ITT.

Ecological surveys will need to be completed throughout 2024 to inform the proposed demolition works, mitigation measures, ESPL Licensing/mitigation strategies for Badger, Bats, Hazel Dormouse, Reptiles and Protected Plant Species for demolition and to support a subsequent Reserved Matters application. It is understood that Natural England aim to issue a decision on bat licencing within 30 working days upon receipt of an application and this could be undertaken in parallel during the contractor procurement process in order to expedite the programme. Please note that all necessary Winter surveys are currently being undertaken by Homes England.

Other future ecological input required, but to be picked up by Homes England's developer team unless required to progress either the demolition works or S73 planning variations, includes:

- Construction Environmental Management Plan (Ecology)
- Biodiversity Enhancement Plan (if required)
- Invasive Non-Native Species Method Statement
- Input into Sensitive Lighting Strategy
- Landscape Design
- Input into Homeowner Awareness Packs
- Delivery of mitigation agreed at outline planning stage, for Badgers, Bats, Hazel Dormouse and Reptiles

Existing buildings and hardstanding

The site was developed into its current layout in the 1980's. Two 2 storey residential properties and outbuildings, and a single storey office block, are present in the South of the site. Eleven further blocks are situated across the site. An asbestos survey, completed in 2004, notes that all of the blocks have asbestos roof sheets and some have asbestos cladding. The remainder are clad with corrugated steel. A number of blocks also have asbestos rainwater pipes. Some asbestos debris and damaged sheeting and fibre glass was noted during site inspections undertaken at the acquisition due diligence stage.

In the North of the site there is an above ground tank and pumphouse, potentially clad in asbestos. A well is situated to the east of the pumphouse. A fuel tank plinth is situated to the east of the main office block; however, the small tank has been removed and there was no evidence of historical spills or leaks during the site inspections.

A concrete block wall, a wall with buttresses and RSJ and concrete panel walls form retaining structures along the northern edge of the built development.

An electrical substation and several air conditioning units supply the site and chill some of the blocks.

There is an existing network of private drainage on site that will require removal either during Homes England enabling works, or by the incumbent developer (TBC). Surface water storage tanks exist in the south west of the site and a surface water pump exists

along the eastern boundary. Removal of these elements will need careful planning and sequencing during demolition to avoid any issues with flooding on site.

There is also an existing well and septic tank associated with the residential units that will require removal.

Numerous concrete slabs, hard standing and retaining walls are present on site, which again will require removal either during Homes England enabling works, or by the incumbent developer.

The site needs to be cleared for redevelopment, with associated challenges around the need for ecological surveys (and seasonal windows), and securing appropriate licences, in addition to planning consent (Prior Approval). There will also need to be a new asbestos survey to identify and plan the removal of ACM's and a structural survey of all buildings and retaining structures to plan plant placement and sequence demolition.

Drainage

The site is situated in Flood Zone 1 and low risk of groundwater flooding. The SE corner of the site is at medium to high risk of surface water flooding. The NW corner of the site is within source protection zone 2 outer catchment.

It is considered that attenuation volume (1,500 m³) will need to be provided in either open basins or underground storage tanks (in line with NPPG drainage hierarchy). The Tibbalds capacity plan shows all surface water storage in above ground basins, which will be the preferred approach of the LLFA.

Consultation responses from Wessex Water and Somerset Highways confirm that there is a 'known' existing surface water connection for the site. However, it should be noted that the consented FRA does not identify the point of connection, ownership or discharge route. Wessex Water plans do not show any sewers in the road. A CCTV survey of the discharge point identified that the site is currently discharging into the highway network, which is highly unusual. This arrangement has been discussed at length with Wessex Water and Somerset Highways, both of whom have acknowledged the current arrangement and provided written confirmation that this will not impact adoption of the surface water sewers on site. Planning condition 11 requires submission of detailed surface water drainage designs, and there remains a residual concern that this arrangement could be further revisited by the LLFA at condition discharge stage.

It is likely that a pumped foul connection will be required to connect the site to the nearest public foul sewer.

Ground conditions

There is considered to be a Low-Moderate risk of contamination due to Made Ground, fuel tanks, electricity substation, historical depot/supply chain site, asbestos debris, historical garden centre, off-site land fill and tyre shop. The NW corner of the site is within source protection zone 2 outer catchment and there is understood to be an on-site well.

Additional Site Investigation will be required as part of the services to fill data gaps, as the 2018 ground investigation only covered select geo environmental issues and no geo technical investigation was carried out. The scope and timing of the further SI will be agreed to align with the demolition strategy and timescales. The site investigation should consider the presence of coal tar in the hard standing given the age of the existing development.

Radon has been identified as a risk for the western area of the site (5-10% of properties estimated to exceed the Radon Action Level). A detailed Radon Assessment is required to determine the need for Basic or Full Radon Protection Measures on site.

Some geotechnical risks have been identified with shrink swell clays (Moderate), running sands (Low-Moderate), compressible deposits (Moderate) and landslides (Moderate)

A king-post retaining wall is present between the woodland area to the north of the site and existing development area in the centre of the site. The level changes on site may present local areas of instability within the site and will require geotechnical assessment.

Services/Utilities

Demand of circa 1MVA has been assessed for the proposed development with an all-electric approach to thermal energy generation applied and provision for EV charging. A new 1MVA substation is likely to be required to serve the proposed development and the existing National Grid substation decommissioned and removed upon installation of the new sub-station.

Utilities associated with existing buildings within the site boundary are present on site. These will have to be disconnected and removed as part of the demolition works. No statutory utilities cross the site. An existing IP gas main runs alongside the southern site boundary and across the proposed site access, which should be protected. Minor diversion works will be required to reposition the overhead line and installation of buried service to the adjacent properties, as well as protection and/or lowering of services at the site entrance.

Lowering and relocation of various services associated with the off-site highway works will also be required.

A new 1MVA substation is required to serve the proposed development at a location TBC. The existing NG substation will be decommissioned and removed upon installation

of a new substation. Provision of new 1MVA substation with 300m of lead up service to site boundary is anticipated.

Access and Movement

There are not considered to be any major access or highway concerns as the site already benefits from the outline planning consent which includes improvements to the existing site access from the A371. However, the existing junction is not currently built to adoptable standards and so widening of the entrance is required.

The existing site access crosses an element of unregistered land to connect to the adopted public highway. This runs from the west side of the existing access, to the eastern extent of the site boundary fronting the A371. There is no access easement in favour of the property and as a result the vendor has taken out defective title indemnity insurance to mitigate the risk.

There are a number of approved off-site highways improvements, some of which are captured in the Section 106 and some of which are considered to be development costs. The works to be delivered under a Section 278 agreement are considered to be;

- a) Refurbishment and upgrading of the existing vehicular and pedestrian access onto the A371 (ref. drawing A107455-SK07)
- b) Provision of crossing points and footway widening on the A371 (ref. drawings A107455-SK05 and A107455-SK07)
- c) Provision of a footpath link from the development to the existing public footpath AX 13/8.
- d) Widening of the existing site access to form an access road perpendicular to the A371.
- e) Works to the Magic Roundabout indicated on drawing A107455-SKo8A

Section 106 contributions have been secured to provide for improvements to the AX 13/4 public right of way, a contribution to a further feasibility study for the Magic Roundabout and travel plan measures.

Air quality, noise and vibration

The site is not located within an Air Quality Management Area and DEFRA's modelled background pollution data shows no exceedances of the National Air Quality Standards.

Axbridge Road bounding the site to the south is the principal source of noise and vibration. DEFRA Round 3 LAeq 16h road data indicates that continuous sound levels are above the external amenity limit of 55dB, except where existing/proposed buildings on the southern boundary provide an acoustic screen. However, a subsequent noise survey and CadnA model has shown that standard double-glazing will suffice for indoor noise and very little mitigation will be required.

Future activities required, but to be picked up by Homes England's developer team unless required to progress either the demolition works or S73 planning variations, include:

- Construction Environmental Management Plan
- Dust Management Plan
- Acoustic Design Statement
- Air Quality Assessment

Historic Environment

The consultation response from the Senior Historic Environment Officer stated that 'there were no archaeological implications to this proposal' and therefore there were no objections or conditions based on archaeological grounds.

Woodland and open space

The extensive wooded area with open space to the north of the site will be retained as part of the development scheme and its future use and long-term management, including ecological mitigation, will be a key consideration

6. Risk summary

Risk management will be crucial to the outcome of the project. The successful consultant will need to draw up a risk register and to manage and monitor this, identifying where solutions can be found to mitigate risks.

The following have been identified as potential key risks:

- Delivery programme risk, given the deadline of the 3 year planning consent (May 2026) and time it will take to obtain required variations to the consent, and then procure a developer who will need to prepare and submit a RM application
- Likelihood of Council planners approving S.73 variations to the current outline consent, and flexibility of the current consent in terms of allowing earthworks to reduce site levels as an alternative
- Political and community objections to the planning strategy
- Complexities arising from ecological constraints, and the ability to execute and expedite necessary mitigation measures under licence
- Potential increased abnormal costs due to ground conditions
- Ability to rely upon existing drainage arrangements, and secure all necessary approvals
- Impact upon financial viability and marketability of site resulting from any failure to secure planning improvements, increased costs, or changes in local sales values e.g due to level of locally competing schemes

7. Stakeholders

The following key stakeholders have been identified and will need to be engaged with during the course of this commission. This list is not exhaustive, and the appointed consultant should identify whether there are any other parties that need to be contacted:

- Somerset Council – relevant officers, and members if appropriate
- Parish Council
- Natural England
- Mendip Bat Group
- Environment Agency
- Surrounding residential and business occupiers

B CONSULTANT BRIEF

Indicative Programme

These dates are indicative only to illustrate the period of the commission envisaged. Suppliers should note the indicative programme dates when preparing their Delivery Methodology in the Response Form.

Key Delivery Milestones	Anticipated Date
ITT issued to Selected Bidders	25 th January 2024
ITT Return Deadline	22 nd February 2024
Evaluation of Tenders	22-29 th February 2024
Notification of Preferred Bidder	1 st March 2024
10 day Standstill Period Ends	11 th March 2024
Inception Meeting	14 th March 2024
Submission of S73 Variations	1 st June 2024
Commencement of marketing of site	1 st September 2024 if using building lease route. There may be some potential to start later if marketing on freehold basis (TBC)
Approval of S73 Variations	1 st November 2024
Commencement of Demolition Works	6 th January 2025
Completion of Demolition Works	7 th April 2025
Conditional contract with developer	3 rd November 2025
Reserved Matters application submitted by developer	29 th May 2026
Reserved Matters approved	30 th November 2026
Start on site	31 st March 2027

The services and deliverables

Project and Cost Management Services

The lead consultant shall be responsible for the management and co-ordination of the multidisciplinary team of consultants to manage inputs and deliverables across the project, including sub-consultants, while undertaking any technical due diligence work and procurement/management of the demolition works. The consultant shall provide an overarching project management service to Homes England for the duration of the project. This may include:

- A full review of all existing information and technical due diligence work to be undertaken. Undertake any further reviews necessary and produce a Baseline Report and a Project Delivery Plan, along with a commission timetable which confirms when various deliverables need to be instructed to support a Section 73 application, demolition works and developer disposal pack. This shall be prepared with due consideration of dates provided in section 2 and in the context of development of the Demolition Strategy for the site (see requirements in section 5). Please note that Homes England will want to review this timetable to agree the phased drawdown/timetable of services, instruction and billing arrangements to complete the commission
- A detailed project programme, in MS Project or similar, to be produced, which must be regularly updated (at least monthly) throughout the commission. This shall include, as a minimum, critical path, key dates, third party inputs, procurement, demolition, and delivery outputs with a record of any key assumptions
- Liaison with all relevant bodies and interested parties throughout the commission, managing the implementation of all other technical, design, landscape, services issues incorporated within this instruction and advise the client accordingly
- Observance of Homes England standard procedures (e.g. Health and Safety, Asbestos, Tendering and Procurement). Further details are available on these if necessary
- Co-ordination of all necessary technical advice to prepare the Technical Pack required during the disposal process including the tender, pre-contract, conditional contract or unconditional contract stages of the project, and provision of warranties and copyright
- The lead consultant shall be responsible for managing the procurement, delivery and quality assurance of work/surveys undertaken by third parties and shall ensure that all outputs are reviewed for alignment with the project aims/strategy. This shall include arranging for site access, and supervision by an appropriately qualified member of staff, as necessary. All procurement activity must comply with Homes

England procedures and scheme delegations.

To provide Q.S input into all necessary viability work, including estimates of abnormal costs associated with any updated masterplan.

Risk Management and Monitoring Services

A risk register to be produced, which must be regularly updated (at least monthly) throughout the commission, and co-ordination of regular risk management workshops.

Property Advice Services

Undertake and record an appropriate marketing exercise of the site for employment use, to inform a potential new application by Homes England's developer to remove the employment use from the current permission.

Provision of property expertise/advice as part of the planning work to ensure that variations to the outline consent are market facing and maximising the commercial opportunity of the site. This must include advice on the space requirements for the care home use to inform the feasibility of moving this use to the front of the site, and housing typologies likely to be required by prospective developers, particularly in respect of ridge heights.

An allowance, separately priced in the event that it is not required, for a viability appraisal with one iteration, and then one red book valuation.

Contract Advice and Procurement Services – Demolition Works (inclusion of slab removal TBC)

Please note that all of the services and deliverables listed below shall be carried out in accordance with the Homes England Technical Briefs on Demolition Strategy, Underground Utilities Mapping, Demolition and Asbestos Removal Specification, and Asbestos Survey Risk Register and Management, appended to this ITT.

DESIGN STAGE

As outlined in 'Project and Cost Management Services', the consultant shall be responsible for information gathering and review of all available site and project information, including (but not restricted to) existing and previous uses, ground and site conditions, topography, environment and adjacent uses, existing services, ecology and habitat surveys, site access as relevant to demolition/site clearance. The sensitivity of protected species and relevant licencing requirements is particularly relevant, which will require close liaison and collaboration with the appointed ecologist/s on the team (see Landscape Design and Ecology Services below).

Identification of any information gaps, and procurement of any surveys as necessary to facilitate the demolition works. This may include, but is not limited to, utility surveys, asbestos surveys, and ecological surveys required to establish mitigation strategies for sensitive species, to facilitate demolition works.

Preparation of Demolition Strategy. Note: discuss and agree with Homes England and rest of consultant team the inclusion of removal of slab and retaining structures, to include estimate of cost and programme, planning requirements/restrictions, risks and impact on site levels.

Management of any necessary statutory approvals, such as relevant planning condition discharge (Prior Approval), including co-ordination with third parties as necessary.

Liaison with utility suppliers to arrange disconnection of services, as necessary, to facilitate demolition in line with the Demolition Strategy and Utilities Strategy.

Prepare and update, as necessary, a pre-tender cost estimate.

TENDER AND AWARD STAGE

Compile a full Demolition, Asbestos Removal Specification for issuing as part of a Tender Pack, informed by the site disposal strategy, site constraints and procurement route. This should cover all works to appropriately de-risk the site as agreed with Homes England and should aim to minimise follow-on work by the developer.

Preparation of all project Tender documentation. This will include all Contract Documentation (form of contract TBC, subject to consultant advice, but anticipated to be NEC3/4), pricing schedule, supporting drawings, Pre Construction Information and any other documentation necessary for Tender purposes to be highlighted.

Administering and carrying out Tender exercise using Pro-Contract (Homes England e-tendering portal), including setting up of project, management of site visits, answering any contractual queries, updating bidders on decisions and completion/closure of procurement exercise. All procurement activity must comply with Homes England procedures and scheme of delegations. *Guidance on the use of Pro-Contract is available from Homes England procurement team.*

Coordination, vetting and appraisal of returned Tenders and completion of a Tender report for recommendation of successful Contractor.

Assisting Homes England Financial Appraisal Team with financial verification, checking of preferred Contractor post tender and ahead of Contract Award.

Assisting Homes England Project Manager with internal approval procedures and writing of papers, including G3a1 form (Approval to Tender) and G3a2 form (Approval to Appoint a Contractor).

Liaison with Homes England appointed Solicitor pre and post tender award to carry out contract checks and finalise contract pack ready for execution. Homes England has standard Z clauses for use with the NEC suite of contracts and these Z clauses must be incorporated with the contract and issued with the tender pack and included in the final contract.

WORKS CONTRACT STAGE

Works anticipated to comprise:

- Arrange a pre-start meeting with the successful contractor. Arrange monthly site progress meetings, and other interim meetings as required
- Co-ordination with contractor as required to ensure pre-start checks are complete and documentation is in place, and of satisfactory quality, prior to start on site
- Project Management and Contract Administration in accordance with form of contract (use of NEC3/4 anticipated). This will extend to include the defects correction period (normally 12 months) if required by the works. Co-ordination of technical disciplines as necessary during the works including appointed ecologist, and asbestos surveyor
- Provision of technical support to the project as required to facilitate the works in accordance with the contract and specification
- Supervision of works through to Completion including site attendance by Supervisor (NEC) on a regular basis, as required by the project. This will extend to include the defects correction period (normally 12 months) if required by the works
- Provision of a monthly progress report on the works throughout the contract period, including as a minimum, progress to date, cost control, project risks, contractual matters, programme, forecast/look ahead
- Monitor and ensure compliance with contractual programme, cost and specification
- Raising any risks, issues or additional work requirements with Homes England Project Manager at the earliest opportunity including management of contract risk register, and communication of Early Warnings/Compensation Event notifications in a timely manner
- Completion and reporting of monthly site inspections during site works period, including H&S (coordinating with CDMA as necessary), management controls, environmental management, waste management and any other areas to be agreed
- Co-ordinate with CDM Principal Designer/CDM Adviser throughout works as required to ensure statutory compliance throughout the works

- Cost manager support to contract, including but not limited to, assessment/forecast of contractor spend, assessment of quotations, assessment and verification of Contractor interim payment certificates and certifying payments, including final account and payment of interim and final retention. Provision of a monthly cost report to Homes England
- Final sign-off of site works and issue of completion certification, in accordance with the chosen Form of Contract
- Ensure satisfactory completion of Completion Report/H&S File in line with contract specification
- Liaison with Homes England estates team on site handover/return to/from contractor

In the absence of a contractor's programme, for the purposes of pricing at tender stage, please assume the following:

- 30 week on-site programme, or as otherwise amended with clear justification; and
- 3 days per week site supervision in a formal NEC Supervisor role. Should any additional site attendance requirements be identified, please outline these clearly, aligned to role type

Note: a cost review exercise will be undertaken upon appointment of contractor and confirmation of site programme, in which any assumptions applied at tender stage may be reviewed and updated.

Construction, Design, and Management and Health & Safety Services

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

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

Principal Designer role

The consultant will perform the duties and responsibilities of Principal Designer as specified in the Construction (Design and Management) Regulations 2015, in particular, Regulation 8 – General Duties; Regulation 11 Duties of a Principal Designer in relation to health and safety at the pre-construction phase, and Regulation 12 Construction phase plan and health and safety file, for the following stages:

- A) Site Planning and Enabling Stage – oversee the preparation of S73 variation applications; and
- B) Technical Due Diligence (site wide) – intrusive site surveys and any other planning or preparation for construction work required in support of completing site surveys

Note: for Demolition Works, the Principal Designer role may transfer to Principal Contractor, with Homes England’s agreement in writing – TBC.

Principal Contractor role

Where site investigation works are considered construction works (as defined within the Construction (Design and Management) Regulations 2015), and where there is more than one contractor working on the project during the construction phase (excluding demolition works contract), the Multi-Disciplinary consultant will be expected to undertake the roles of Principal Designer (in accordance with brief) and Principal Contractor.

Where there is only one contractor working on the project during the site investigation works, the Principal Designer will assist Homes England (and working with the appointed CDM-A) in discharging its client duties e.g. confirming the contractor has got the skills, knowledge, experience and organisational capability, provision of pre-construction information, checking construction phase plans and welfare facilities are provided and suitable prior to the start of work, and monitoring the H&S performance of the contractor.

Town and Country Planning Services

Full review of planning history and current outline consent, conditions and S106 agreement, and Title Report from Homes England’s solicitor DWF. Investigate and report on local political context and impact on proposed planning strategy.

Immediate assessment of any risks and proposed mitigation associated with the proposed S73 variation approach.

Advise on planning requirements/restrictions, in relation to the current outline consent and conditions, and advise on any resulting technical surveys and plans required to support the Section 73 application. In particular, liaison with the LPA will be required to improve the position in relation to the building height restrictions, allowing two storey development in those areas of the site currently constrained by the approved heights. The engagement with the LPA should ensure that a Section 73 application can be submitted to amend the approved parameters plans and secure building heights above the ridge heights of the existing buildings on site.

Advise Homes England, including liaison with Homes England solicitor at DWF, on any

options to protect the existing planning consent e.g early payment of CIL, should there be a risk that the timetable for securing a developer, and subsequent submission of an RM application, mean that the current 3 year deadline is missed.

Obtaining of Planning (Prior Notification) and Building Act Section 80/81 Approvals for the demolition works, and removal of the slab if deemed appropriate.

Work with the appointed ecologist to co-ordinate all surveys required to allow satisfactory discharge of outline planning conditions to support Wildlife Licensing applications to Natural England in advance of demolition (inclusion of slab removal TBC).

Working with the appointed ecologist to progress Pre-screening advice with Natural England to discuss any EPS mitigation licences in relation protected species; in order to determine the level of information/planning status required in order to ensure demolition can be undertaken in accordance with the planned timescales for the site.

Submit, and progress through to determination, necessary application/s to discharge the planning conditions.

Working with the Landscape consultant within the team to provide an appropriate LVIA, with other necessary supporting material, to support the case for removing the current building height restriction. All work to be carried out in accordance with the Homes England Technical Brief on Landscape Visual Impact Assessment appended to this ITT.

Attendance at any required meetings with the LPA to establish their likely response to the S73 variation approach and all necessary requirements.

Maintain a dialogue to build a relationship with Somerset Council Planning Officers, and where necessary, engagement with local stakeholders e.g Parish Council, Mendip Bat Group.

Preparation, submission and management through to determination, of a S.73 variation application or applications (to be advised), to enhance the current planning permission by removal of the current building height restriction, resolving minor discrepancies in the approved plans, and relocation of the care uses (subject to Property advice).

Work with the Property advisor within team to scope out the marketing of the employment use and agree strategy to prepare evidence for future application by Homes England's developer to remove requirement from current consent.

If required, working with the appointed ecologist in the team, to produce a BNG Assessment. This work must be completed in accordance with the Homes England Technical Brief on BNG Assessment appended to this ITT.

Stakeholder and Community Engagement and Social Value Services

Identify all relevant stakeholders, and if required, carry out local engagement e.g Parish Council, Mendip Bat Group.

To work with demolition contractor to agree a communications strategy e.g with surrounding residents/businesses.

In carrying out consultation on behalf of Homes England, the consultant will also need to comply with data protection requirements (General Data Protection Regulation (GDPR) 2016) and address matters relating to equality, diversity and inclusion in the approach to consultation and materials produced (legal requirements are set out in Government's Public Sector Bodies (Websites and Mobile Applications) Accessibility Regulations 2018), as well as meeting Homes England's branding guidelines. Please note it is not expected that a Homes England website will be required, unless otherwise agreed with the PM including a full quote for associated costs and programme.

Masterplanning Services including Urban Design and Architecture

Appropriate and proportionate commercial masterplanning support to optimise the site layout, in terms of relocation of uses, introduction of above ground SuDS features and the implications from the revised LVIA. Given the issues with building height restrictions, levels and retaining walls, the masterplanning exercise will require close liaison and co-ordination between the civil and structural engineer and the town planning consultant.

The masterplanning services required will be;

- Produce all design documents required for the amendment to the outline planning approval which are likely to include:
 - a) Updated Site layout to optimise development
 - b) Updated Constraints and Opportunities Plan
 - c) Updated DAS or addendum to the DAS
 - d) Updated parameter plans and site sections
 - e) Produce a parcel code (if required)
- Liaise with the consultant team including the planning consultant to submit a policy compliant and viable amendments to the outline planning approval
- Revise any layout drawings required through the approval process

Landscape Design and Ecology Services

Provision of an appropriate LVIA, with other necessary supporting material, to support

the case for removing the current building height restriction. All work to be carried out in accordance with the Homes England Technical Brief on Landscape Visual Impact Assessment appended to this ITT.

Conduct further, and update existing, ecological surveys to support the developer technical pack and to inform discharge of relevant outline planning conditions and, if required following receipt of the updated ecology surveys, submission of an application for a Natural England European Protected Species Mitigation Licence (EPSL) application/s using experienced ecologists, ideally with local knowledge and experience, with 'Earned Recognition' status. The ecologists must also hold Class Licences for badger mitigation e.g in the event that it was necessary to close any badger setts, and similarly in relation to dormice, ecologists with a track record in mitigation/licences should be part of the consultant team.

Note: It is assumed that the consultant will remain as "Named Ecologist" during the demolition works, and that the demolition contractor will be required to provide suitable accredited agents to work under the terms of the licence. The Consultant should allow for preparation of licence application, supporting documentation, oversight during the works, and collation/submission of post works reporting to Natural England. Please make any assumptions for survey days clear.

For the purpose of pricing Natural England fees may be excluded.

Working with the Town Planning consultant, progress Pre-screening advice with Natural England to discuss any EPS mitigation licences in relation protected species; in order to determine the level of information/planning status required in order to ensure demolition can be undertaken in accordance with the planned timescales for the site.

Please note that all necessary winter ecological surveys are being currently undertaken. All work to be carried out in accordance with the Homes England Technical Briefs on PEA INNS and Protected Species appended to this ITT.

The appointed consultant will be responsible for identifying all ecology survey requirements and ensuring that these are carried out to support the delivery programme, but it is anticipated that required surveys will include the following. *(Seasonal constraints have been provided in parentheses - if no seasonal constraints are stipulated it should be assumed that these works can be carried out at any time of year).*

REQUIREMENTS TO SUPPORT A PLANNING APPLICATION

1. Ecology Desk Study
2. Extended Phase 1 Habitat Survey
 - a. Phase 1 Habitat Survey *(mid-Apr to early Oct)*
 - b. Preliminary Roost Assessment of Buildings *(Assume completed 2023/2024)*
 - c. Preliminary Ground-Level Tree Assessment for roosting bats *(Nov – Feb)*

d. Badger Survey (*Ongoing 2023/2024*)

3. Great Crested Newt Habitat Suitability Index Assessment and Great Crested Newt eDNA Survey of ponds within 250 m of the site (*mid-Apr to end-Jun*)

4. Bat Surveys, following the survey effort stipulated by Sedgemoor District Council for sites within Bat Consultation Zones A and B

a. Aerial inspection of trees with bat roost habitat suitability that will be impacted by the development (*Ground level tree assessment ongoing 2023/2024*)

b. Nocturnal bat emergence/re-entry surveys of trees and buildings with bat roost habitat suitability that will be impacted by the development (*May to Aug*)

c. Nocturnal bat activity transect surveys (*Apr to Oct*)

d. Hibernation bat surveys (*ongoing 2023/2024*)

5. Breeding Bird Surveys (*mid-Mar to early-Jul*)

6. Reptile Surveys (*Apr/May or Sept*)

7. Hazel Dormouse Surveys (*Apr to Nov*)

8. Detailed Protected and Invasive Non-Native Plant Species Survey (*mid-Apr to early Oct*)

9. Biodiversity Net Gain Design Stage Assessment, (if required) including:

a. UKHab Survey/Habitat Condition Assessment (*mid-Apr to early Oct*)

b. Design Stage Report

10. Ecological Impact Assessment

POTENTIAL REQUIREMENTS TO SUPPORT DELIVERY

11. Badger

a. Monitoring surveys to confirm activity levels of setts prior to licence application

b. Natural England Licence (will be required if an active sett is identified within, or adjacent to, the site and a minimum buffer of 30m cannot be maintained)

c. Mitigation Strategy (will be required if any impacts to badger setts are anticipated)

12. Bats

- a. EPSL Application
- b. Mitigation strategy (will be required if the destruction or obstruction of a roost is required)

13. Hazel Dormouse

- a. EPSL Application
- b. Mitigation strategy (will be required if dormouse are confirmed as present within the site)

14. Reptile Mitigation Strategy (likely to be required but the scope will be informed by the final site design and results of reptile surveys described above)

15. Protected Plant Species Mitigation strategy (will be required if any protected plant species are confirmed as present within the site)

Please assume all budgets for ecology items 2-15 will be reviewed following initial PEA and protected species surveys.

Structural and Civil Engineering Services

Scope, commission and undertake a programme of supplementary ground investigations to infill data gaps and to ensure that present day conditions across the site are captured. This should take account of the requirements in the Homes England Brief 'Desk Study and Intrusive Ground Investigation' as annexed to this ITT.

The scope must take account of the updated masterplan and must be updated to reflect current requirements in terms of chemical analysis and geotechnical parameters. All works will be managed through the consultant in accordance with Homes England Health and Safety and CDM Requirements. The proposed investigations would be suitable for planning submissions and sufficient for developers to price all associated foundation solutions, earthworks and remediation strategy.

As a minimum, the further supplementary investigation must encompass:

- a) A summary of all information from the Desk Study Reports, including the preliminary CSM and risk assessment
- b) A summary of all information from all previous intrusive investigations
- c) A description of the work undertaken

- d) A summary of all factual information, including exploratory hole logs, trial pit photographs (and core photographs where applicable), laboratory test data and field monitoring data (groundwater and ground gas / vapour)
- e) A summary of all encountered ground conditions (including geotechnical parameters)
- f) GQRA (Generic Quantitative Risk Assessment) for soil and groundwater contamination
- g) Ground gas risk assessment
- h) Assessment of risk to drinking water supply pipes
- i) Revised CSM and risk assessment
- j) Preliminary waste classification for excavated materials taken off-site (hazardous / non-hazardous)
- k) Initial advice on the potential appropriate re-use of soils within the site boundary using DoWCoP guidance
- l) Geotechnical assessment including, but not be limited to, foundation (and floor slab) recommendations, buried concrete classification (BRE SD1), earthworks acceptability, preliminary pavement design (CBR) recommendations, ability to excavate, excavation support requirements, requirements for de-watering excavations and suitability of the site for infiltration drainage (including ground permeabilities calculated from soakaway tests / borehole permeability tests)
- m) Preliminary Foundation Zoning Plan (including reference to any potential tree influence or desiccation)
- n) The updated site investigations must be carried out in line with the National Quality Mark Scheme for Land Contamination Management (NQMS) to provide visible identification of documents that have been checked for quality by a Suitably Qualified and experienced Person (SQP)
- o) The consultant must estimate all ground-related abnormal costs and provide a likely timetable for any mitigation measures required
- p) Scope and timing of the site investigation works should be aligned with the demolition and enabling works strategy for the site

Topography & Earthworks Strategy

- a) Appraise the existing topographic surveys and identify and commission any further survey updates (if required) that will be required to facilitate the masterplan, levels, drainage and earthworks strategy. Refer to requirements of Homes England brief 'Topographical Survey' appended to this ITT
- b) Undertake a levels appraisal, including cut and fill, to inform an earthworks balance, along with any retaining requirements and associated abnormal costs identified
- c) Prepare a high-level engineering strategy to include outline design of site levels including DDA compliant access, retaining walls, highways and drainage to prove feasibility and identify abnormal requirements. The access design for highways would be in accordance with access gradients suitable for road adoption by the Local Authority

FRA and Drainage Strategy

- a) Review the planning approved FRA for suitability
- b) Produce an updated Drainage Strategy, outlining the required surface and foul drainage routes, storage requirements, integration of SuDS into the masterplan. The Strategy will identify any upgrades, additional attenuation, diversions or pumping stations required. It will also address the adoption strategy for the site
- c) The Drainage Strategy should be in compliance with current regulations and developed in line with Local Authority requirements
- d) The Strategy will set out a plan for phasing of the drainage infrastructure to allow co-ordinated delivery of the proposed development parcels
- e) The Drainage Strategy must also include a review of land title information, including wayleaves and historic rights that need to be considered to successfully deliver the Strategy
- f) The Drainage Strategy should be informed closely by and respect site levels and natural lay of the land in accordance with site visits, as well as the Topographic Survey. The Strategy will require consideration of the site surroundings and adjacencies to consider run-off and catchment fully
- g) The foul drainage strategy likely requires a new pumping station and rising main infrastructure and the proposed outfall is remote from the site. A strategy should be developed to inform the discharge point and rising main routing
- h) GPR survey of the whole site to identify anything not already known. More detailed surveys e.g. CCTV and manhole surveys are required in access locations and where existing utilities are identified within the site to determine depth and material of the sewers to understand the requirements for connections
- i) The drainage scheme is expected to only be required to an outline level of design, but this will need to include site finished floor and external levels. The outputs should include an outline drainage strategy (including finished floor levels and external levels).
- j) Identify all abnormal costs, phasing and programme implications associated with delivery of the developed Strategy.

Utilities

- a) Undertake a GPR survey of the whole site to identify services not already known in accordance with Homes England Guidance Note 'Underground Utilities Mapping' appended to this ITT
- b) Develop a Utilities Strategy in accordance with Homes England Guidance Note appended to this ITT. The Utilities Strategy will detail the requirements of any disconnections, diversion works, protection works, reinforcement works (on-site or off-site), to serve a new development, including identifying any sterilised land as a result of utility services remaining on site. The Strategy should include the likely utility risks, the mitigation strategy and firm costs to execute the strategy from utility companies
- c) The Strategy should be developed to reflect current Building Regulations, Future Homes Standard and EV charging requirements
- d) The Utilities Strategy must also include a review of land title information, including wayleaves and historic rights that need to be considered to successfully deliver the Strategy

- e) The Strategy should develop a co-ordinated utilities infrastructure plan showing the existing retained services, diverted services, any reinforcement works required, together with new service provisions leading up to the development site(s). The Strategy will include any requirements for sub-stations, booster stations, gas governors, and fibre master cabinets etc. Any impacts on timescales for delivering such works and risks to the development should be highlighted, along with any opportunities for mitigation
- f) The Strategy should investigate, in detail, any requirements for major upgrade works, highlighting risks to project budgets and timescales and consider the impact of the Strategy on development phasing
- g) The Strategy should address the phasing of new supplies to ensure co-ordinated, practical and logical delivery of the works on site

Transport and Traffic Services

The consultant should:

- a) Work with engineer and architect to develop the masterplan in line with current LPA policy, including any Supplementary Planning Guidance in relation to parking, cycle infrastructure and EV charging strategy
- b) Liaise fully with all relevant stakeholders including the Highways authority and the property agent appointed
- c) Review all transport related planning conditions and advise on the extent of off-site highway works required under the existing approval
- d) Review the Section 106 Agreement to verify all contributions for off-site highway works and improvements to public rights of way and ensure there is no overlap with the developer delivery obligations stipulated via planning condition
- e) Identify all abnormal costs, phasing and programme implications associated with delivery of the off-site highway works

Travel Plan

- a) Review the approved Framework Travel Plan
- b) Advise on any implications in terms of further survey or monitoring work, programme impacts and resulting abnormal costs in respect of the de-risking strategy and supporting information required for the developer sales pack

Asbestos Services

Please note that all of the services and deliverables listed below shall be carried out in accordance with the Homes England Technical Briefs:

- Demolition Strategy
- Asbestos Management Survey, Risk Register and Management Plan and Asbestos Refurbishment Survey or Asbestos Demolition Survey

- Asbestos Demolition Refurbishment Survey Brief
- Demolition and Asbestos Removal Specification
- Asbestos Air Monitoring Clearance Testing Brief

Management surveys for the site are provided within the annexes accompanying this ITT. The Consultant shall review this information, and accordingly design, and undertake to complete demolition / refurbishment asbestos survey of all structures/areas of the site, as necessary, in order to identify all asbestos containing materials that are likely to be disturbed as a result of the planned demolition/enabling works.

Utilise output of the survey to inform development of the Demolition Strategy and Demolition & Asbestos Removal Specification.

Provide technical advice to Homes England as necessary.

At this stage, whilst the specific outcomes of a demolition asbestos survey and removal works/monitoring requirements are unconfirmed, the consultant shall provide rates for:

- Asbestos monitoring to include specified activities as per the enclosed brief (per day).
- Four stage clearance testing and certificate of reoccupation.

Other consultants being used/procured

Please note that Winter Ecological Surveys have been commissioned by Campbell Reith and are currently in progress.

Meeting and reporting requirements

This commission will be managed day-to-day by a Senior Manager in the Homes England Planning and Enabling Team. The consultant team will need to work with various members of the Planning and Enabling, Disposals, Technical Services Teams, and others as required.

In addition, the consultant team will need to work with relevant stakeholders listed in Section A.7.

Meeting Requirements

A Project Inception Meeting (all senior members of the consultant team) with representatives from Homes England, to be held as soon as possible after appointment. The supplier would be expected to make all suitable arrangements for this and host if a face-to-face meeting is appropriate.

Thereafter, Project Management Meetings/updates for the overall project to be organised, and minuted, on a fortnightly basis, unless otherwise agreed with the PM. Agendas to be circulated at least 3 days in advance with programme, risk register, issues, and action log updates.

Please note that all review meetings must include an agenda item to discuss the supplier's progress against the action plan and metrics committed to in response to the social value question for this instruction.

Poor Performance Meeting

These meetings will hopefully not be required. However, if poor performance is repeated following escalation to the Supplier's Key Personnel to resolve the issue, as required in the Framework Management Schedule of the Framework Contract, the Framework Manager must be notified and Homes England may call for a Poor Performance Meeting. Beforehand, Homes England will present areas of concern so that the Supplier and Homes England can discuss what happened and why, what will be done to prevent it happening again and how matters will improve. The Supplier subject to such a meeting would be expected to outline in writing in a Rectification Plan afterwards what improvements/modifications they will be putting in place. There will be a maximum of two Poor Performance Meetings before termination of the commission.

C OTHER REQUIREMENTS

1. Payment

A Resource and Pricing Schedule will be required, and it is anticipated that fees will be paid on satisfactory completion of specific milestones/tasks/packs of work. The Schedule should therefore break down each element of the Key Deliverables into a specific Milestone/Task/Pack of Work including team members and fixed fees against hours and agreed Framework rates. This is to ensure that both quality and timescales are maintained at all times.

Please note that increases will only be accepted where this is an additional commission of tasks and not due to an underestimate of work hours by the bidder. It is acknowledged that some third party costs may be remeasurable, but these must not be subject to any uplift fee from the lead consultant (cost only).

Travel costs and other expenses should also be included within the resource and pricing schedule and will not be chargeable separately.

2. Collateral Warranty

You must include a collateral warranty requirement in the following circumstances:

- when required for any purchaser/tenant/funder acquiring legal interest in Homes England land where they will rely upon the work/services provided by the Consultant
- where it is anticipated that the site will be disposed of in phases

Collateral warranties will need to be provided by the appointed consultant to a developer or other party.

There will not be any opportunity to amend the provisions of the Collateral Warranty documentation.

3. Termination

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.

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.

4. Site Visit

Bidders are invited to a site visit if needed. Further details to follow on ProContract. Homes England staff will not be able to answer any questions on the day. Any questions need to be submitted on ProContract after the visit.

Part 2 - Instructions for Submitting a Response

1. General

- 1.1 Please refer to the ProContract Portal Advert for the Further Competition deadline. Tender responses **must** be submitted on ProContract. Please regularly check ProContract for any amendments to the Further Competition deadline. For all ProContract portal issues please contact ProContractSuppliers@proactis.com.
- 1.2 Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
- 1.3 **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, Homes England. It is the Suppliers responsibility to check the ProContract website for any updates to the Procurement process. No claim on the grounds of lack of knowledge of the above mentioned item will be entertained.**
- 1.4 The Supplier must check the Further Competition ITT for obvious errors and missing information. Should any such errors or omissions be discovered the Supplier must send a message via the messaging function on ProContract. No alteration may be made to any of the documents attached thereto without the written authorisation of Homes England. If any alterations are made, or if these instructions are not fully complied with, the tender response may be rejected.
- 1.5 All clarification requests must be sent using ProContract no later than 10 working days before the Further Competition deadline shown on ProContract. Any queries submitted after this may not be answered. Homes England will respond to clarifications as soon as practicable.
- 1.6 Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England. Homes England will consider any such request and will either respond on a confidential basis or give the Supplier the right to withdraw the clarification question. If the Supplier does not elect to withdraw the question and Homes England considers any clarification question to be of material significance, both the question and the answer will be communicated, in a suitably anonymous form, to all prospective Suppliers who have responded. If Suppliers consider that page limits set out in Section 20 (Evaluation Criteria) are insufficient to provide the information required by the question then a clarification request should be raised. No guarantee can be given that the page limit will be increased.

- 1.7 Tender responses must not be accompanied by statements that could be construed as rendering the tender response equivocal and/or placing it on a different footing from other Suppliers. Only tender responses submitted without qualification strictly in accordance with the Further Competition ITT (or subsequently amended by Homes England) will be accepted for consideration. Homes England's decision on whether or not a tender response is acceptable will be final.
- 1.8 Tender responses must be written in English and both Microsoft and PDF versions of tender documents must be submitted.
- 1.9 By submitting a Tender, each Supplier undertakes that, in the event of its Tender being accepted by Homes England, it will deliver the services and each individual instruction in accordance with the Framework Agreement Terms and Conditions without variation. The Framework Agreement Terms and Conditions shall not be amended in any way and any document submitted as part of the Tender which purports to do so shall have no effect and shall be disqualified. Homes England shall not engage in any negotiations over the terms of the contract either before or after Tender close nor in relation to each individual instruction. By submitting a Tender, a supplier is accepting the terms of the Framework Agreement without variation other than to put into effect details relating to the supplier and Tender specific information and in respect of each individual instruction made under the Framework Agreement. Suppliers shall be aware that persistent failure to accept the Framework Terms and Conditions in respect of individual instruction may cause the supplier to be suspended or removed from the Framework.
- 1.10 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.
- 1.11 Homes England reserves the right to cancel this Further Competition process at any time.

2. Conflict of Interest

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

3. Confidentiality

- 3.1 This Further Competition ITT and associated information is confidential and shall not be disclosed to any third party without the prior written consent of Homes England. Copyright in this Further Competition ITT is vested in Homes England and may not be

reproduced, copied or stored on any medium without Homes England's prior written consent.

- 3.2 Suppliers shall not undertake, cause or permit to be undertaken at any time any publicity in respect of this Further Competition process in any media without the prior written consent of Homes England.

4. **Quality**

- 4.1 A Response Form template has been provided in Part 3 to respond to the Quality questions detailed in Section 8. The Response Form must be **completed and returned** as part of the tender response.

- 4.2 Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 3. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

5. **Pricing**

- 5.1 A Resource and Pricing schedule has been provided with this Further Competition ITT which must be completed and returned as part of the tender response.

- 5.2 The pricing approach for this Further Competition is a Maximum Contract Price.

- 5.3 In terms of the task/deliverable relating to providing technical advice during the disposal process, although maximum contract price should be provided for the production of the Technical Pack, the scope beyond this is unknown. Bidders should therefore provide for an hourly rate for individuals that provide the relevant services which must not exceed agreed framework panel rates. Agreed phasing and financial caps for this element of the commission will be agreed upon appointment in order to set up the TMS instruction.

- 5.4 The list of activities in the Resource and Pricing Schedule is not exhaustive and there may be additional duties/services required that will emerge as work is undertaken. Any such activities should be added into the Schedule with a note to highlight. This commission may be extended on client instruction to cover such matters as arise, based on a time charged fee schedule completed in the tender response. The commission will only be extended if the services relate to the original objective of the overall call off contract.

- 5.5 Suppliers are reminded that day rates for all individuals must be the agreed Framework Contract rates unless discounted rates are offered and will be used for all of the services.

6. Evaluation

- 6.1 Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to Homes England. The evaluation criteria (and relative weightings) that Homes England will use to determine the most economically advantageous Tender are set out in Section 20 (Evaluation Criteria) below and the scoring approach is detailed in Section 25 (Worked Example). Scores will be rounded to two decimal places.
- 6.2 Evaluators will initially work independently. Once they have completed their independent evaluation they will meet to discuss, understand and moderate any differences they have via a consensus meeting, where a single consensus score for each question will be agreed.
- 6.3 Award decisions will be subject to the standstill period if over the FTS Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.

7. Documents to be returned

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

8. Evaluation criteria

8.1 Scoring method

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

- 5 – Excellent** Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.
- 4 – Good** Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.
- 3 – Acceptable** Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.
- 2 - Minor Reservations** Some minor reservations of the Supplier’s understanding and proposed methodology, with limited evidence to support the response.
- 1 – Major Reservations/Non-compliant** Major reservations of the Supplier’s understanding and proposed methodology, with little or no evidence to support the response.
- 0 - Unacceptable/Non-compliant** Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.

PLEASE NOTE:

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

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

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

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

Question 1 will be assessed on a pass/fail basis.

Yes = Pass

No = Fail

8.2 Quality Questions

Lots 1 and 2 – ITT questions

Number	Criteria	Tender requirement	Weighting	A4 limit
1	<p>Terms and Conditions Acceptance</p> <p>Please confirm acceptance of the Framework Agreement Terms and Conditions for appointment to the framework and for each individual instruction.</p> <p>By submitting a Tender, each Supplier undertakes that, in the event of its Tender being accepted by Homes England, it will deliver the services and each individual instruction in accordance with the Framework Agreement Terms and Conditions without variation. The Framework Agreement Terms and Conditions shall not be amended in any way and any document submitted as part of the Tender which purports to do so shall have no effect and shall be disqualified. Homes England shall not engage in any negotiations over the terms of the contract either before or after Tender close nor in relation to each individual instruction. By submitting a Tender, a supplier is accepting the terms of the Framework Agreement without variation other than to put into effect details relating to the supplier and Tender specific information and in respect of each individual instruction made under the Framework Agreement. Suppliers shall be aware that persistent failure to accept the Framework Terms and Conditions in respect of individual instruction may cause the supplier to be suspended or removed from the Framework.</p>	<p>Yes = Pass</p> <p>No = Fail</p>	Pass/Fail	N/A

	Suppliers will pass this question by accepting the Framework Agreement Terms and Conditions for appointment to the framework and for each individual instruction. If a supplier does not pass this question the supplier will be disqualified.			
2	Resourcing	<p>Please confirm that the resourcing information provided at Sifting Brief stage still stands.</p> <p>If you wish to change any of the subconsultants or personnel, please note that this can only be done with the express consent of the Homes England Project Manager.</p>	N/A considered at Sifting Brief stage	Maximum 1 page
3	Programme and risk	<ul style="list-style-type: none"> • Please explain how each required discipline will deliver their scope of services, with appropriate deployment of adequate resources, during the course of this programme. • Demonstrate how you will ensure that proposals are technically deliverable and do not have internal conflicts, e.g. ecology, landscape and drainage proposals all work together. • Review the project brief and all due diligence information provided. • Explain where you see the key risks to programme and cost, and how you will mitigate these. These might include technical, planning, stakeholder or other risks. • Please include a detailed delivery programme based on the indicative programme provided in 	20%	5 pages in total - 3 pages for approach plus 2 pages for programme (which can be A3) Font 12 point Calibri

		Part 1B of this Further Competition ITT showing key activities and dependencies.		
Project Manager to select appropriate Methodology questions for your project				
4a	Methodology - planning	Please provide a methodology statement demonstrating your understanding of the requirements for the work, the need for adequate resources, key deliverables, and any opportunities for added value, innovation or risks identified in this project brief. This should include as a minimum: The planning strategy you propose to adopt to successfully promote the Site in the timeframes as set out in this ITT including a high level commentary on the planning policy environment (please do not list out the relevant policies) and how it may present opportunities or risks to the project as described in the project brief. You may provide examples to support your response as appendices, but please note that these examples will not form the basis of the evaluation.	15%	3 pages Font 12 point Calibri
4b	Methodology – demolition	Please provide a methodology statement demonstrating your understanding of the key technical challenges, the need for adequate resources, and opportunities such as waste management and addressing sustainability issues, associated with the demolition works of this project and your team’s capability to tackle these. You may provide examples to support your response as appendices, but please note that these examples will not form the basis of the evaluation	15%	3 pages Font 12 point Calibri
5	Social value	Please demonstrate how you will support the government’s Social Value commitment through the delivery of this project.	10%	4 pages in total - 3 pages for approach plus 1 page

		<p>Your response should demonstrate how you will support the Model Assessment Criteria (MAC) below:</p> <p>MAC 4.2: Influence staff, suppliers, customers and communities through the delivery of the contract to support environmental protection and improvement.</p> <p>Please include in your response:</p> <ul style="list-style-type: none"> - Your 'Method Statement' stating how you will achieve the Model Assessment Criteria - A timed project plan and process, including how you will implement your commitment and by when. Also, how you will monitor, measure and report on your commitments/the impact of your proposals. You should include but not be limited to: <ul style="list-style-type: none"> ○ timed action plan ○ use of metrics ○ tools/processes used to gather data ○ reporting ○ feedback and improvement ○ transparency - How you will influence staff, suppliers, customers and communities through the delivery of the project to support the Policy Outcome, <p>Please see Social-Value-Model-Edn-1.1-3-Dec-20.pdf (publishing.service.gov.uk) for more information on the Model Assessment Criteria</p>	<p>for Action Plan Font: 12 point Calibri</p>
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Price will account for 40% of the Overall Score. The lowest price will gain the maximum marks with other prices expressed as a proportion of the best score using the maths explained in the worked example below.

Criteria	Demonstrated by	Weighting
Price	Completed Resource and Pricing Schedule	40%

8.3 Worked example of weighting and scoring

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

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	PASS	N/A	N/A	PASS	41
	2	N/A	N/A	N/A	N/A	
	3	4	20%	4	16	
	4a	3	15%	3	9	
	4b	4	15%	3	12	
	5	2	10%	2	4	
Supplier B	1	PASS	N/A	N/A	PASS	49
	2	N/A	N/A	N/A	N/A	
	3	4	20%	4	16	

	4a	4	15%	3	12	
	4b	5	15%	3	15	
	5	3	10%	2	6	
Supplier C	1	PASS	N/A	N/A	PASS	N/A (fail)*
	2	N/A	N/A	N/A	N/A	
	3	1	20%	4	N/A	
	4a	2	15%	3	6	
	4b	3	15%	3	9	
	5	2	10%	2	4	

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

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

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

Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	41	40	81	1
Supplier B	49	20	69	2

Supplier C	N/A	N/A	N/A	N/A
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Part 3 – Response Form

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

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

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

- 1. Resourcing**
- 2. Programme and Risk**
- 3. Methodology – Planning**
- 4. Methodology - Demolition**
- 5. Social Value**

Resource and Pricing Schedule

Excel spreadsheet to be embedded by Supplier in response.

Document Information	
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Version History			
Version	Date	Summary of changes	Editor
1.0	31/07/2023	New branding	Commercial Officer
1.1	07/11/2023	T&Cs wording inserted	Senior Commercial Manager