



Development and Regeneration Technical Services (DARTS) Framework

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

**Professional Planning, Technical and Design
Services, Former British Sugar Site, Millfield Lane,
York, YO26 6GB**

Issue Date: 18/09/2023

ProContract Identification Number: DN679775

**Deadline for responses:
09.30am Friday 13 October 2023**



Introduction

Homes England launched its new Strategic Plan in May 2023. Our mission is to drive regeneration and housing delivery to create high-quality homes and thriving places. This will support greater social justice, the levelling-up of communities across England and the creation of places people are proud to call home.

The purpose of this Further Competition Invitation to Tender ('ITT') is to award the call-off contract to bring the British Sugar site forward in a way that meets our mission; subsequent to the Sifting exercise undertaken September 2023.

As a successfully sifted consultant, we ask that you respond to the questions detailed in Part 2, Section 6 (Evaluation Criteria) of this Document using the Response Form; and subsequently to return the Response Form and Resource and Pricing Schedule in Part 3 alongside your tender.

This Further Competition ITT is divided into 3 parts:

Part 1 – Commission Requirement

- Details the commission requirements; and
- 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; and
- Outlines the evaluation criteria which will be used for assessment. It is important that Suppliers familiarise themselves with the criteria and ensure they are considered when compiling their tender response.

Part 3 – Standard Forms

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

Part 1 - Commission Requirements

A PROJECT BRIEF

1. Commission background

We are working with the Landowner to agree terms to acquire and take forward delivery of the former British Sugar site at Millfield Lane in York ('the site'). This is an important emerging housing allocation for the City of York. We are issuing this Framework Procurement in advance of acquisition, to enable Homes England to have a fully procured professional team in place to provide two stages of work:

Stage 1 – Pre-Acquisition: A review of Technical Due Diligence ('TDD'), to inform the detailed terms of acquisition. The TDD should identify the optimum strategy to deliver the site, which will be implemented at Stage 2; and

Stage 2 – Post Acquisition: Progress the planning & enabling and delivery strategy once the legal land title is transferred. The scope and programme of this strategy will be defined by the conclusion of the TDD undertaken by the consultant at 'Stage 1'.

Upon acquisition, it is envisaged that Homes England would seek to take forward the site as 'Master Developer': undertaking remediation and discharging planning requirements to enable the redevelopment of site as a high quality, major housing site - capable of delivering up to 1,100 homes with ancillary uses including a new primary school, community and neighborhood facilities. The proposed delivery strategy will see Homes England undertake the remediation, earthworks, utilities and (potentially) main junction access works prior to the phased disposal of development parcels to housing developers. For the purpose of this bid, please assume that Homes England will take on the role of Master Developer however depending on policy changes we may review this position and could take an alternative approach e.g. Joint Venture.

To support Homes England through the de-risking of the site, we are seeking the appointment of a Multi-Disciplinary Consultancy Team. This commission will build on the existing Planning Consents and submission of Reserved Matters Applications: taking forward the design, tendering, supervision of the main remediation and post monitoring works followed by EA permit surrender. In addition, there will be similar consultancy tasks to discharge other Master Developer works; including but not limited to planning conditions and Section 106 obligations, drainage and utility works - all supported by planning input.

For the purposes of completing the ITT exercise, the bidder should assume that Homes England will pursue the existing Outline Planning Permission and Environmental Agency ('EA') Permit in the initial instance; unless material considerations arising from further discussions with City of York Council, the Technical Due Diligence and Detailed Planning Strategy Review undertaken following instruction of the appointed sub-consultant identify an alternative optimum strategy to deliver the site. Therefore, all bidders should consider that future planning activity may include (but is not limited to) submission of new and/or supplementary planning applications across the British Sugar site, which may require the associated preparation of an updated Masterplan and Environmental Impact Assessments. However, it should be reiterated that you should respond to this commission based on implementing the current permission.

The Housing and Regeneration Agency

It may also include an alternative approach to the EA Permit Surrender strategy and could also incorporate surrounding plots of land that will be subject to discussions between Homes England Acquisition colleagues and the relevant landowners during the TDD period. Bidders should consider such scenarios within their ITT response.

All potential bidders should be aware that this procurement has commenced in advance of negotiations for the acquisition of this site being finalised. **In the event acquisition is not completed, this procurement process will terminate at the completion of Stage 1 (Technical Due Diligence).**

The site is secured by the existing owners and under no circumstances should potential bidders attempt to gain access to this site. Bidders are also respectfully requested not to approach the existing owners under any circumstance.

UPDATE

British Sugar: Discussions are ongoing regarding the potential acquisition, including a meeting between Homes England and British Sugar representatives in August 2023 to provide an update on the current position. Subsequently, a full data room of historic documents has been provided by British Sugar and will be made available to the appointed consultant following their successful ITT bid.

The successful consultant will then be required to carry out the TDD promptly and comprehensively to identify the optimum strategy for delivering this site. It is envisaged the TDD work undertaken at Stage 1 will feed into the valuation (Note: project valuation consultants are already appointed) and inform the preferred strategy for delivering the site.

Please note that, if the conclusion of the Stage 1 TDD work results in Homes England not acquiring the site, **the commission will end at the end of Stage 1.**

City of York Council ('the Council' / 'CYC'): A meeting between Homes England and Senior Officers at CYC took place on 4th September 2023 in order to enhance Homes England's understanding of key issues at the site and CYC's aspirations for the delivery of a key strategic site. Options for additional land acquisitions have also been discussed. The successful consultant will be required to work collaboratively with CYC Officers throughout Stages 1 and 2 of this commission; and to attend meetings with CYC and its' consultees where required throughout their instruction

Environment Agency ('EA'): A key consultee in this process, Homes England are in the process of arranging the meeting with Senior Officers to discuss the background to the EA Permit and the on-going application by the Landowner to vary it. It is expected that the successful consultants will build on existing Homes England relationships with the EA to conclude the TDD work.

The implications of the EA permit and the remediation strategy will need careful consideration at TDD stage as this will inform the future planning and delivery programme. If this development programme suggests that the OPA is not implementable in the full, Homes England would expect the successful consultants to confirm the revised optimum delivery strategy.

2. Delivery strategy

The scope of Stage 1 will be to fully review the existing technical information to determine key ground, planning and environmental risks that will inform Homes England negotiations for the site's acquisition.

The Housing and Regeneration Agency

A key outcome for Stage 1 will be to identify a preferred planning and delivery strategy for the site. Timescales set by the approved conditions associated with implementing the full planning permission 15/00524/OUTM are now extremely tight and, for this reason, the Team's initial approach will be to determine whether the OPA can be implemented in full; given time elapsed since consent was granted for the site at Appeal in 2018. The development programme will be heavily dictated by the processes and timescales required to surrender the EA Permit.

As such, the planning and delivery options could be as follows:

- Aim to implement the whole permission by the deadline of September 2033; or
- Aim to implement part of the extant permission, delivering the maximum number of dwellings and infrastructure before the permission 'expires'. This would mean submitting a new outline application for part of the site, including a partial update of the Masterplan, Environmental Statement, and all associated works; or
- Aim to submit a new outline planning application for the site. This would require an updated Masterplan, new EIA and Homes England could consider the acquisition of surrounding land parcels to provide a more comprehensive approach to access and development.

A robust development strategy and programme will need to be developed as part of the Stage 1. If it is concluded that delivering the OPA is not achievable or Homes England should pursue an alternative strategy, the bidder must consider the prospect of a fresh planning application being required. Therefore, this commission may need to make provisions for a new outline application, including Masterplan, access and EIA elements. There may also be an alternative approach to the EA Permit that facilitates an earlier surrender, and any consequences of this approach should be considered in the Stage 2 scope of works.

It is envisaged that Homes England would seek to take forward the site as a Master Developer, undertaking remediation and discharging planning requirements to enable the redevelopment of site. The anticipated delivery strategy will be to dispose of parcels of the wider site in phases using our Dynamic Purchasing System ('DPS'). It is anticipated that Homes England will commission and carry out enabling works including the remediation and new access.

At a later stage, Homes England will appoint a property agent to support development of a disposal strategy that reflects the market and Homes England objectives. This will include detailed phasing and development standards. However, the planning strategy will need to be commercially facing and also reflect Homes England's objectives.

The successful consultant will be retained to support Homes England in the disposal process during the RMA submission and clarification period with the appointed developer. This will include advice on technical and planning matters.

Homes England will seek to include our standard conditions of disposal including Modern Methods of Construction ('MMC'), design quality and meeting our new Key Performance Indicators ('KPIs') - including assessments against Building for Healthy Life ('BHfL'), delivery at pace, placemaking and social value. Sustainability requirements are an emerging area, but it should be assumed that Homes England will either comply with the requirements of the OPA or be policy compliant in respect of any new approvals. However, this will be subject to further discussions with CYC Officers, particularly in any scenario involving CYC land (such as the former Manor School site adjacent).

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

3. High-level Objectives

The overall objective is to bring the site forward as quickly as possible whilst ensuring the development meets the needs of the Local Authority and local community. The project will deliver against Homes England's five strategic objectives which are:

- We will support the creation of vibrant and successful places that people can be proud of, working with local leaders and other partners to deliver housing-led, mixed-use regeneration with a brownfield first approach;
- We will facilitate the creation of the homes people need, intervening where necessary to ensure places have enough homes of the right type and tenure;
- We will build a housing and regeneration sector that works for everyone, driving diversification, partnership working, and innovation;
- We will promote the creation of high-quality homes in well-designed places that reflect community priorities by taking an inclusive and long-term approach; and
- We will enable sustainable homes and places, maximising their positive contribution to the natural environment and minimising their environmental impact.

We have set KPIs to help achieve these objectives, which will be integral to this project. The ambition is to deliver high quality housing on the site guided by the aspirations of CYC. Social Value is going to be a key consideration for this project and once appointed, the chosen consultant will develop a Social Value baseline which will be guided by CYC and Homes England (see the [Social Value Model](#) for further information). You will need to review CYC's emerging policy on this and develop a baseline and approach to the objectives set out in Section 8.2 – a brief summary can be found at Annex 5.

4. Quality standards

At Disposal Stage, developers will submit bids based on achieving positive scores of 3 or above in BfHL. The successful consultant will need to have a good understanding of BfHL and the Design Review process as well as an understanding of our new Key Performance Indicators and Strategic Objectives; including how these will shape the project to be able to advise the Homes England Disposals team during the DPS tender/appointment of development partner stage.

5. Site Information

The 100-acre site is located to the north-west of York, approximately 1.4 miles from York City Centre, between the A59 Boroughbridge Road and the Harrogate/East Coast mainline railway. The site sits within the defined urban area, with the surrounding area is characterised by pre-1960's suburban housing of relatively low density.

In a wider context, the site is bound to the northeast by the Harrogate and East Coast railway line, with the river Ouse and an area of green open space located beyond. To the north of the British Sugar Site there is existing commercial development, located off Millfield Lane and within York Business Park. Acomb district centre is located to the southwest of the site. A confectionary factory, known as the Tangerine Site, is located off Millfield Lane to west. The new Manor School site is located further west and is accessed off Millfield Lane with York's Northern Outer Ring Road (A1237) beyond.

The Housing and Regeneration Agency

A planning application red line boundary plan is shown below:



There are three planning permissions relating to the Former British Sugar site, which together enable the delivery of the residential led development of up to 1,100 homes.

The details are set out in the table below:

Permission	Ref No	Date of Approval	Description of Development
'Outline Masterplan'	15/00524 /OUTM	28 Sept 2018	Outline application for the development of the site comprising up to 1,100 residential units, community uses (D1/D2) and new public open space with details of access (to include new access points at Millfield Lane and Boroughbridge Road and a new link road, crossing the Former Manor School Site) and demolition of the Former Manor School buildings
'Full Remediation'	20/00774 /FULM	24 July 2020	Construction of a development platform, landform engineering works and site remediation & reclamation
'FMS Link Road'	17/01072/ FUL	12 Sept 2017	Construction of 2no. access roads onto Boroughbridge Road and Millfield Lane and a link road across the former Manor School Site in association with the redevelopment of the former British Sugar site, with associated demolition of former school buildings.

The Housing and Regeneration Agency

Homes England are advised that each consent has been implemented and is extant. It is important to note that Condition 5 of the outline permission requires that the 1st phase Reserved Matters application be submitted to CYC within 7 years of the outline permission approval date (i.e. by 28th September 2025). At this stage, it is assumed that Homes England will pursue the consented scheme, subject to the outcome of the Due Diligence exercise to be undertaken by the appointed consultant at Stage 1 of this instruction.

British Sugar have advised they are preparing an infrastructure-led first phase RMA in respect of Green infrastructure, sports pitches, Main Street (across the former Manor School site) and re-alignment of Carr Ings Drain to meet this requirement. This will be preceded by a Section 73 application ('S73') to vary some of these details of the OPA and an EIA Scoping Opinion (further details below).

In addition to Condition 5 of the outline permission, Condition 6 states that a start on site must be achieved either eight years after the approval date (i.e., September 2026) or one year after the first Reserved Matters approval. The consultant will be required to provide deliverable options of a first phase of development to keep the planning permission live.

Condition 7 also states that all Reserved Matters Applications ('RMAs') should be submitted with 15 years of the Outline Planning Permission (i.e., by September 2033). The EA Permit Surround programme is critical to securing the submission of all RMAs in advance of this date and the preferred strategy is likely to be dictated by whether this is achievable.

City of York Council have verbally confirmed the time constraints imposed by the relevant Reserved Matters OPA conditions cannot be varied via a S73 application on legal grounds. We are seeking legal advice on this matter; however, it should be assumed that a S73 to vary conditions 5, 6, 7 and 8 will not be accepted by CYC. Therefore, the appointed Consultant should consider in their bid the possibility of Homes England being required to submit a further and/or new planning application across part or all of the Site.

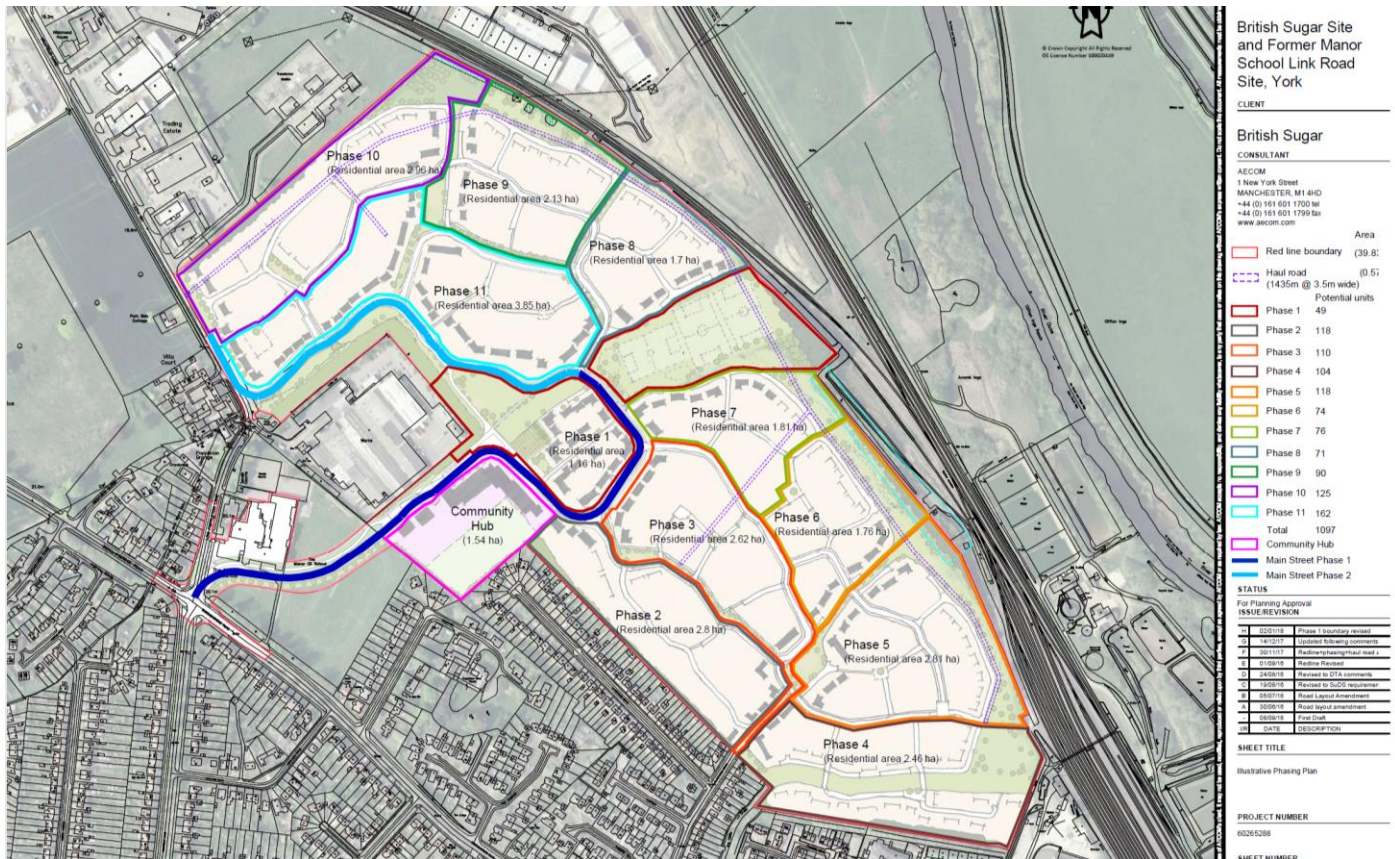
The OPA Masterplan, as approved, is shown below:



The Outline Planning Permission ('the OPA') is supported by a Parameters and Design Principles document which includes fixed design principles relating to:

- Access and Movement
- Development Zones and Land Uses
- Green Infrastructure
- Urban Framework
- Maximum Building Heights

Approved Illustrative Phasing plan



Planning Update

British Sugar Scoping Opinion & Further Section 73 Application

It is British Sugar's intention to submit a S73 application in October this year reflecting further detailed designated technical work undertaken and necessary changes in legislation following approval of the OPA, and in ensuring changes made to the permitted remedial development platforms under more recent applications 20/00774/FULM and 20/00869/FUL are accurately reflected in the OPA Masterplan. It is understood British Sugar are engaged in positive pre-application discussions with the Council regarding submission of this application.

Given passage of time and adoption of the 2017 EIA Regulations (the approved Environmental Statement having been prepared under the 2011 Regs), the forthcoming S73 will be supported by an Addendum to the 2014 OPA Environmental Statement. British Sugar submitted a Scoping Opinion in August 2023 (Reference: 23/01570/EIASP) to assist in informing parameters of the ES Addendum to accompany the S73.

Consultee responses regarding the Scoping Opinion should be observed by the appointed Consultant in monitoring the potential requirement for future Environmental Statements at the site; and in monitoring for submission of British Sugar's pending S73 application.

British Sugar Environmental Permit Extension Application

British Sugar have also applied to vary the Environmental Permit to cover more of the development land. Homes England understand that this extension to the Permitted area follows private consultation between British Sugar and the EA. The variation was submitted to the Environmental Agency in September 2022 and is subject to ongoing dialogue, including the submission of further information and clarifications by British Sugar. The consultation for the extension has now closed and the EA is considering the application. We do not expect a decision to be made on this during the ITT process.

The Housing and Regeneration Agency

The key risk of this project is the ability to implement the Outline Planning Permission: which is dependent on the surrender of the EA permit. The extension to the permit (submitted in September 2022) applied for has not yet been approved. Once granted, this will effectively increase the area of the permit, reducing the developable area until the permit can be surrendered. Given the tight timescales for submission of all RM Applications, as imposed by the OPA, additional risk will arise upon extension of the permit in implementing all phases as permitted by the Outline Masterplan.

Key risks:

- EA approving extended permit area – *timescale unknown*;
- Start on site for remediation – dependent on above – *timescale unknown*;
- Submission of and approval of S73 to vary the definition of Phase 1 – *6 months*; and
- Start on-site for access road – *timescale unknown*.

Once all project risks are understood and an optimum delivery strategy is advised, subsequent to the Stage 1 TDD process, Homes England will review all available and viable options to bring the site forward. The successful consultant will draft a full risk register.

7. Stakeholders

The successful consultants will need to pick up relationships quickly with the EA and CYC. Liaison with British Sugar and their consultants will be required. Homes England has good working relationships with CYC, and it is anticipated some community consultation with local Members and residents will be needed to update them on progress and gain support for the project and any changes which may come about from the planning process.

B CONSULTANT BRIEF

1. Indicative Programme

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

Key Delivery Milestones	Anticipated Date
Deadline for submission to ITT	9.30am Friday 13 October 2023
End of 10-day standstill	Friday 27 October 2023
Commencement Date	30 October 2023
TDD starts	30 October 2023
TDD draft report	18 December 2023
Final report & Delivery Strategy proposed	12 January 2023
Progress to Stage 2 (post-acquisition)	April 2023

2. The Services and Deliverables

Homes England are seeking to procure a professional team to undertake two stages of work:

- Stage 1 – Pre-Acquisition: A review of Technical Due Diligence, to inform the detailed terms of acquisition. The TDD should identify the optimum strategy to deliver the site, which will be implemented at Stage 2; and
- Stage 2 – Post Acquisition: Progress the planning & enabling and delivery strategy once the legal land title is transferred. The scope and programme of this strategy will be defined by the conclusion of the TDD undertaken by the consultant at 'Stage 1'.

A summary of each stage is provided below:

Stage 1:

- Gap analysis of available technical information – Access to British Sugar dataroom will be provided on instruction (the majority of this information is listed on the CYC planning portal);
- Technical Due Diligence desk top report (TDD3) required. This will include delivery risk, technical risk opportunities, review of current Masterplan and phasing strategy, review of updated abnormal development costs (Annex 1);
- Review the Outline Planning Application and subsequent condition discharge and S73 application to provide recommendations regarding opportunities, risks and future strategies to either deliver the required RMAs or pursue a new planning permission;
- Advise on the optimum planning & delivery strategy for the site, including approach to securing EA permit surrender at the earliest opportunity.
- Provide any necessary input into the merits and feasibility of Homes England exploring the acquisition of adjacent land, including analysis regarding the potential benefits from a Masterplanning and access perspective, in particular;
- Site visit and attendance at any consultation or meetings, as required.

In parallel to Stage 1, Homes England will be instructing an update of costs, legal due diligence, and economic advisors separately to this ITT. This information will be available to the appointed consultant team.

Stage 2:

The Housing and Regeneration Agency

There are a series of workstreams required to progress the planning and delivery strategy. Multi-Disciplinary services will be required to undertake the scope of works, as set out below.

However, please note that in a scenario whereby the TDD concludes that the preferred strategy would be to pursue a new planning application, Homes England reserve the right to procure specialist Masterplanning services from Lot 2 of the DARTs framework. This DARTs multi-disciplinary commission will therefore carry out all scope of works outlined in this brief to secure a new outline planning permission except for the Masterplanning work. The successful consultant of this DARTs commission will be required to work collaboratively with the Masterplanning consultant from Lot 2.

1. Project and Cost Management Services

- Programme and project management for duration of the commission, including preparation of a Project Execution Plan;
- Project management of the team, monthly project meetings, preparation of agendas, minutes and co-ordination of action tracker;
- Cost consultancy as required;
- Easements to be legally agreed with utilities;
- Preparation of technical pack in support of Dynamic Purchasing Service (DPS) tender and input as required into DPS appraisal and assessment process;
- Support and input to internal G2, G3a, G3b papers approvals including preparation of tender reports for appointment of 3rd party contractors;
- Prepare and maintain cost/spend profiles and forecasts;
- General professional advice as required;
- Required to input into disposal process pre and post appointment of developer;
- Responsibility for leading all discussions with relevant external stakeholders including highways and LPA;
- Additional tasks as will be required over the course of the project development;
- All changes to be agreed with the project team in advance of works progressing;
- Compliance with Key Performance Indicators.

2. Risk Management and Monitoring Services

- Preparation of the risk register and environmental input into the risk register;
- Risk management will be crucial if the delivery strategy is to secure a timely surrender of the EA Permit and implement the current Outline Planning Permission. The successful consultant will need to draw up a risk register ideally for each of the extant permissions and to manage and monitor this identifying where solutions can be found to mitigate risks.

3. Contract Advice and Procurement Services

- The successful consultant will be required to design and prepare tender documentation associated with any ground surveys or infrastructure works.
- Manage all procurement for technical or infrastructure works including assessing bids, preparing evaluation reports and to provide input into G3 and other necessary Gateway papers. It is envisaged that there will be procurement of contractor to carry out the remediation works, additional ground survey and monitoring works, infrastructure works which include demolition of at least one redundant building and removal of some sub-structures.

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

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

The Housing and Regeneration Agency

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

Principal Designer role

To undertake the role of Principal Designer to ensure that the Homes England complies with its statutory responsibilities as CDM client under the Construction (Design and Management) Regulations 2015 and its general duties under the Health and Safety at Work etc Act 1974 (Annex 2).

Principal Contractor role

Where the 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, the Multi-Disciplinary consultant will be expected to undertake the roles of Principal Designer (in accordance with brief) and Principal Contractor (Annex 2).

Where there is only one contractor working on the project during the site investigation works, the Principal Designer will assist Homes England 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. All Risk Assessment Method Statements (RAMS) will be reviewed and approved ahead of any works to commence.

5. Town and Country Planning Services

- Planning and Masterplanning advice regarding whole-site integration with initial phases of development;
- Provide advice on how to bring forward a first phase of development which complies with the planning conditions, environmental permit area and approved access;
- Prepare the delivery strategy for all phases of infrastructure, residential, mixed-use development including community and neighbourhood facilities with consideration of all known constraints and opportunities;
- Provide professional planning advice to ensure the Outline Planning Permission does not expire before the first Reserved Matters deadline of September 2025 or the submission of all RMAs by September 2033;
- Liaison with CYC to ensure compliant highways design;
- Reserved Matters Application for the drainage and utilities;
- Planning for the demolition of redundant buildings;
- Response to LPA and consultee queries and requests for supplementary information both during RMA preparation and post submission;
- Attend and represent Homes England at planning committee as required;
- Construction traffic management strategy;
- Discharge the remaining conditions in the planning permission to ensure site compliant with the approved remediation strategy; and
- Discharge of remaining conditions of the road design of the junction, and access roads into the site along Boroughbridge Road and Millfield Lane to obtain CYC approval.

6. Stakeholder and Community Engagement and Social Value Services

The Housing and Regeneration Agency

In carrying out consultation on behalf of Homes England, the Appointed 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), in addition to meeting Homes England's branding guidelines.

It is anticipated there will need to be a period of community engagement with key stakeholders; including local neighbourhood representatives, interest groups (e.g. representatives of the Poppleton Neighbourhood Plan), residents and local members. The resource and pricing schedule should price for face-to-face meetings, and you should set out how engagement will take place including any external websites/portals to be used. There may be a requirement for a separate legal agreement if it is deemed necessary an external website is required in conjunction with community consultation activities.

7. Masterplanning Services including Urban Design and Architecture (assuming current permission is delivered)

- Optimise the current Masterplan within the OPA;
- Potential development of new consent and Masterplan to include possible additional land, to execute an exemplar high quality scheme, detailed review and options including production of a detailed site plan. To include design review and incorporation of Building for Healthy Life ('BfHL') based on the approved OPA Parameters Plan and Design Principles; and
- Design Masterplans for development and regeneration project, considering all physical, technical, social, economic, statutory, stakeholder and environmental and financial issues and constraints.
- Liaise with the sustainability consultant to achieve a Masterplan design which meets the Client's and the Local Authority's sustainability targets.

8. Environmental Impact Assessment Services

It is Homes England's understanding that, provided Reserved Matters submissions associated with the OPA sit within the original parameters tested by the approved Environmental Statement, no ES updates or addendums will be required in implementing the scheme as consented.

However, the appointed Consultant will be required to demonstrate knowledge of *The Town and Country Planning (Environmental Impact Assessment) Regulations 2017* and in the preparation of Environmental Statements and Environmental Statement Addendums should such work be required in the submission of new and/or supplementary planning applications across the site.

9. Landscape Design and Ecology Services

- Design all of the soft and hard landscape within a Landscaping Masterplan -including public realm and shared garden spaces, taking into account all physical, technical, social, economic, statutory, stakeholder and environmental and financial issues and constraints;
- Prepare all necessary drawn and written information, including all necessary reports required by CYC, relating to landscape in the lead up to and in support of outline or detailed planning submission(s); and
- Develop a site wide stewardship strategy to deliver a coherent and consistent stewardship solution applicable over the entire development cycle of the entire site.

10. Environment and Sustainability Services

- Advise on, write a brief for, and undertake the following surveys:
 - a. Arboricultural;
 - b. Protected and/or notable species and habitats; and
 - c. Invasive Non-Native Species (e.g., Japanese Knotweed, Himalayan Balsam, Giant Hogweed, etc.) as well as any notifiable weeds or other identified invasive species.

The Housing and Regeneration Agency

- Obtain all necessary licences and consents (including geographically-specific) in relation to species and habitats in order to facilitate works on site, including to assist other investigations, surveys, and for construction activities;
- Provide surveys, investigations, advice, assessments, strategies, and reports on all environmental aspects (such as air, land, water, ecology, resources, materials, waste, transport, buildings etc associated with land and building development);
- Advise the Client regarding appropriate on and off-site Biodiversity Net Gain ('BNG'), as required - including targets, costings and relevant authority consultee liaison;
- Devise and monitor a BNG strategy for a project, including at Feasibility and Design Stages if required;
- Advise on the upcoming Environmental Net Gain ('ENG') regime and use ENG as the reporting structure as and when it supersedes BNG; and
- Advise on key corporate and project sustainability strategy and targets, relative to current and future standards and influences.

Environment Agency Permit

- Liaison with the EA during the process of the transfer of the permit and ultimate closure and surrender of the permit;
- Review the Remediation and Reclamation Strategy approved by EA to ensure compliance;
- Design and prepare all tender documents and procure qualified contractor to carry out the remediation and reclamation works; and
- Establish post remediation/earthwork monitoring wells and undertake monitoring, sampling, testing and EA liaison to ensure permit requirements are satisfied to facilitate closure and surrender of the permit.

11. Structural and Civil Engineering Services

Advise on ground-related matters, working with specialist contractors/sub-consultants to optimise design solutions at early RIBA stages as required. Support required to include (but not limited to):

- a) Historical and geo-environmental setting to ascertain if any land contamination may be present on or off the site;
 - b) Ground investigation(s) specification, procurement, site supervision and interpretive report; Presence of Unexploded Ordnance (UXO) and radioactivity or other hazards;
 - c) Geo-environmental conditions which may impact drainage, SUDs and ecology or future development;
 - d) Geotechnical and mining issues that may influence the geotechnical stability and future land use including detailed earthworks design and geotechnical compaction specification;
 - e) Most economical detailed foundation and drainage solutions following the remediation and earthworks phase; and
 - f) Site levels including cut and fill modelling for required site earthworks. Design methodology to target cut/fill balance i.e. no net import or export of material.
- Provide coordinated structural and civil engineering design to facilitate regeneration and development of land to RIBA stage 4 and secure all necessary technical approvals. This would include, but not limited to, earthworks and ground improvement, drainage, highways, bridge structures (if applicable), other structures, utilities, and services.
 - Design appropriate drainage strategies, Sustainable Drainage Systems (SuDS) and flood mitigation infrastructure, considering relevant site conditions (e.g. topography, permeability, and potential contamination) and likely future discharge rate from Lead Local Flood Authority.

12. Transport and Traffic Services

- Provide analysis of current vehicular and pedestrian access (formal and informal, including trespass) and capacity, including the provision of Transport Assessments, Travel Plans, Parking Assessments, and Construction Traffic management Plan etc; and
- Design future access arrangements and solutions for the site and demand with likely capacity upgrades and alterations required.

13. Utilities / Energy Strategy

- Feasibility assessment and design of site-wide utilities strategy, capacity, provision of potable water/electric/telecoms/fibre; and
- Sustainability / Energy Statement – if required.

3. Key Staff Required

If the Supplier needs to replace any Key Staff (as identified within your ITT submission and/or later agreed modified with Homes England) during the commission; an equally qualified and experienced replacement must be proposed by the Supplier - and approval for their replacement must be given by the Project Manager. In addition, all staff supplying CV's must be allocated to the project.

4. Other Consultants being Used/Procured

Back-to-back appointments are required prior to any contract being executed.

As stated, should the TDD result in the need for a new OPA, Homes England may secure this specialist support from the DARTS Lot 2 framework. This will be explored with the successful consultant of this commission.

5. Meeting and Reporting Requirements

The Senior Planning and Enabling Manager will be responsible for the management of the successful consultants. The successful consultants will need to work collaboratively with CYC and EA and other key stakeholders.

The successful consultants will need to attend monthly meetings to report on progress followed up with minutes of the meetings and actions for next steps. Other meetings with the EA and CYC will be necessary as required. It is anticipated that Homes England will enter into either pre-application or PPA with CYC. The consultants will be required to attend at least one meeting during the TDD stage.

Meeting Requirements

Start-up meeting

An inception meeting will be diarised for mid/late October, date to be decided. The key team will be required to attend in person to Homes England's Leeds office.

Review meetings

The Project Team will review performance and progress against KPIs on a quarterly basis. The Project Team will agree the baseline for the KPO's with the Project Team on appointment. The scope of the baseline for the Social Value will be agreed with the successful consultant and 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

The Housing and Regeneration Agency

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

C CONTRACT MATTERS

1. Payment

Fees will be paid on completion of TDD Stage 1 and at Stage 2, payments will be paid monthly or at the end of agreed milestones.

2. Collateral Warranty

You must provide collateral warranties:

- Collateral warranties will need to be provided by the appointed consultant to a developer or other party.
- Where the site may be disposed of in phases, multiple Collateral Warranties will be required for the future developers of each phase.

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

Project Level Key Performance Indicators

This commission will be subject to performance review and management. There are Project Level Key Performance Indicators ('KPIs') which the successful consultant will be required to meet/exceed.

The KPIs are as follows;

- Quality
- Health & Safety Quality
- Timely delivery against milestones
- Cost overruns
- Social Value method statement and delivery
- Project Management
- Staff retention

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.

Part 2 - Instructions for Submitting a Response

1. General

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

1.9 Under no circumstances shall Homes England incur any liability in respect of this Further Competition or any supporting documentation. Homes England will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their tender response to this Further Competition.

1.10 Homes England reserves the right to cancel this Further Competition process at any time.

2. Conflict of Interest

2.1 Homes England will exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic, or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

2.2 Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform Homes England, detailing the conflict in a separate Appendix.

3. Confidentiality

3.1 This Further Competition ITT and associated information is confidential and shall not be disclosed to any third party without the prior written consent of Homes England. Copyright in this Further Competition ITT is vested in Homes England and may not be reproduced, copied, or stored on any medium without Homes England's prior written consent.

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

4. Quality

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

4.2 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.

The pricing approach for this Further Competition is:

- **Stage 1:** Lump sum fixed fee;
- **Stage 2:** Lump sum fixed fee;

5.2 Stage 2 pricing – you must price for the implementation of the current planning permission. The list of activities in the Resource and Pricing Schedule is not exhaustive and there may be additional

The Housing and Regeneration Agency

duties/services required that will emerge as work is undertaken. You may price for additional tasks to show additional requirements needed to bring forward the site. These will not form the assessment of overall price.

- 5.3 Should the TDD work result in a recommended change of planning and delivery approach, the successful consultant will be expected to provide services to achieve the overall objective of bringing forward a deliverable residential development which may involve a new planning application. This commission may be extended on client instruction, 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.
- 5.4 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 CVs for staff proposed to undertake this commission (no more than 2 pages each). ***You must only supply CVs for the team who will be actually working on the project. Any CV's which are submitted - we will expect time allocated to the project in the resource and pricing schedule.***

8. Evaluation criteria

8.1 Scoring method

Quality will account for **40%** 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.

The Housing and Regeneration Agency

8.2 Quality Questions

Lots 1 and 2 – ITT questions				
The Housing and Regeneration Agency				
Number	Criteria	Tender requirement	Weighting	A4 limit
1	Resourcing	<ul style="list-style-type: none"> Please confirm that the resourcing information provided at Sifting Brief stage still stands. If you wish to change any of the subconsultants or personnel, please note that this can only be done with the express consent of the Homes England Project Manager post appointment. Please ensure you have read and understood the KPI regarding staff retention and replacement and provide commentary on how this will be managed if it arises. Supporting CVs for staff proposed to undertake this commission (no more than 2 pages each). <i>You must only supply CVs for the team who will actually be working on the project. Any CV's submitted will expect to be time allocated to the project in the resource and pricing schedule. This will be checked and monitored by the Homes England Management Team at regular intervals throughout the lifetime of the commission.</i> 	N/A - scored at Sifting Brief stage.	CVs 2 pages each
2	Programme and risk	<p><u>TDD Stage 1 Services</u></p> <ul style="list-style-type: none"> Please provide a programme showing completion of the TDD report and highlight perceived risks to completion and how they may be mitigated against. State how the existing information will be interrogated. <p><u>Stage 2 services – implementation of the current OPA</u></p> <ul style="list-style-type: none"> State how all different disciplines/sub-consultants will be coordinated and managed to ensure a comprehensive joined up delivery strategy. Please state how you will ensure these (different disciplines) can be critically challenged. 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. 	5%	5 pages in total - 3 pages for approach plus 2 pages for programme (which can be A3)

The Housing and Regeneration Agency

		<ul style="list-style-type: none"> Please include a detailed delivery programme based on the indicative programme provided in Part 1B of this Further Competition ITT showing key activities and dependencies. 		
3	Methodology – place-making & planning question	<ul style="list-style-type: none"> Please provide your analysis of the site and brief, stating where the opportunities and risks lie for achieving excellent place-making, referring in particular to the first four criteria of Building for a Healthy Life standard; <ol style="list-style-type: none"> 1) Natural connections; 2) walking, cycling and public transport; 3) facilities and services; 4) homes for everyone. Demonstrate how you will ensure that proposals are technically deliverable and do not have internal conflicts, e.g., ecology, landscape, access, and drainage proposals all work together. Please produce a constraints and opportunities plan. Based on the current permission please explain the planning strategy you propose to adopt and provide a high-level commentary on the existing and emerging 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. 	15%	6 pages total – 5 pages for approach plus 1 page for constraints & opportunities plan (which can be A3)
4	Methodology – environmental/permit question	Based on the current position with the EA permit, the extension application, and the proposed remediation strategy, please explain the delivery strategy you propose to adopt, and provide a high-level commentary on the opportunities or risks to the project. This will include a summary of how the works will be carried out, managed and monitored.	10%	4 pages (max)

The Housing and Regeneration Agency

		Please provide an example/case study (preferably residential) with your answer to highlight where you have successfully worked with EA on a landfill permit variation, or similar which resulted in a timely positive outcome.		
5	Social value	<p>Please demonstrate how you will support the government’s Social Value commitment throughout delivery of this project. Your response should demonstrate how you will support the Model Assessment Criteria (MAC) below:</p> <p>MAC 2.2: Create employment and training opportunities particularly for those who face barriers to employment and/or who are located in deprived areas, and for people in industries with known skills shortages or in high growth sectors.</p> <p>MAC 8.1: Demonstrate collaboration with users and communities in the co-design and delivery of the contract to support strong integrated communities.</p> <p>For each Model Assessment Criterion, 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"> o timed action plan o use of metrics o tools/processes used to gather data o reporting o feedback and improvement o transparency 	10%	4 pages in total - 3 pages for approach plus 1 page for Action Plan

The Housing and Regeneration Agency

	<p>- How you will influence staff, suppliers, customers, and communities through the delivery of the project to support the Policy Outcome,</p> <p>Please see Social-Value-Model-Edn-1.1-3-Dec-20.pdf (publishing.service.gov.uk) for more information on the Model Assessment Criteria</p>		
--	---	--	--

Price will account for **60%** 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	60%

8.3 Worked example of weighting and scoring

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

The examples used below are for a competition with a 60/40 price/quality ratio.

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	N/A	N/A	N/A	N/A	38
	2	3	10%	2	6	
	3	4	20%	4	16	
	4	3	20%	4	12	
	5	2	10%	2	4	

The Housing and Regeneration Agency

Supplier B	1	N/A	N/A	N/A	N/A	44
	2	3	10%	2	6	
	3	4	20%	4	16	
	4	3	20%	4	12	
	5	5	10%	2	10	
Supplier C	1	2	N/A	N/A	N/A	N/A (fail)*
	2	1	10%	2	Fail	
	3	2	20%	4	8	
	4	2	20%	4	8	
	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 50)
Supplier A	350	$350/350 = 100\%$	$100\% * 60 = 60$
Supplier B	700	$350/700 = 50\%$	$50\% * 60 = 30$
Supplier C	250	N/A	N/A

The Housing and Regeneration Agency

Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	38	60	94	1
Supplier B	44	40	84	2
Supplier C	N/A	N/A	N/A	N/A

Part 3 – Response Form

Framework:	DARTS
Project Title:	Professional Planning, Technical and Design Services, Former British Sugar Site, Millfield Lane, York,
ProContract Identification Number:	DN679775
Supplier:	
Date:	

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

4. Social Value

Resource and Pricing Schedule

Excel spreadsheet to be embedded by Supplier in response.