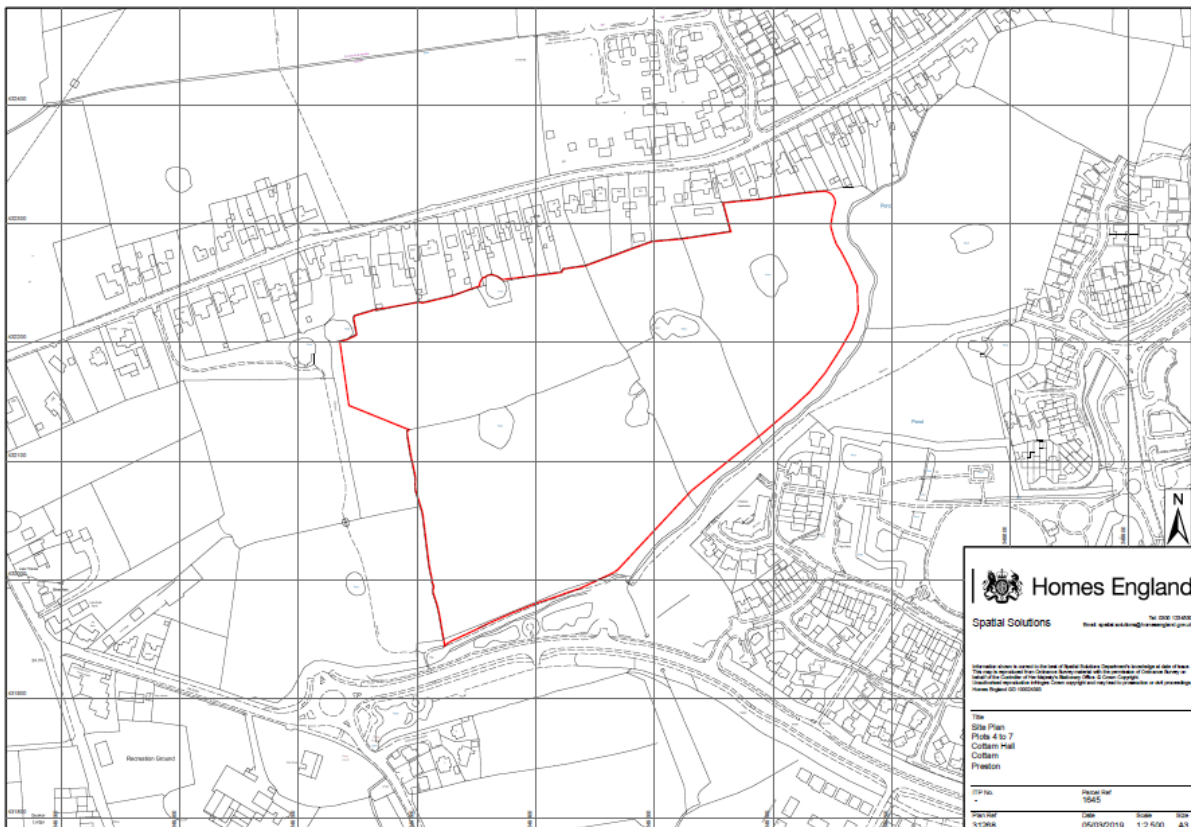




Homes England

Brief For Property and Technical Services – Mini-competition Land at Phase 5 (Plots 4 – 7) Cottam Hall, Preston

HOMES ENGLAND NW Operating Area – Accelerated Delivery Team



Issued: Monday 5th August 2019
Deadline for response: Friday 30 August 2019

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1 Introduction and Purpose of Brief

Homes England has significant land assets in the Central Lancashire area inherited from its Commission for New Towns (CNT) and English Partnerships (EP) legacies of which this site, Phase 5, is one.

Cottam Hall is one of Preston's principal growth nodes located approx. 5 km north of the city centre between established residential suburbs and the M55. Homes England's land ownership in this area extends to 52.5ha of predominantly greenfield land. Homes England has a pipeline of sites in Cottam Hall that are at various stages of development, marketing, de-risking or awaiting longer term action.

Homes England secured outline planning permission (Ref 06/2012/0145) for the development of 1100 dwellings, children's play areas, open space provision and associated infrastructure including internal road layout, footpaths & cycle routes and the necessary ecological mitigation measures.

A phasing strategy was approved as part of the planning permission and in accordance with this, Homes England's disposal strategy to date has been to release its land in seven phases, six of which are residential and one a community site. This strategy has been extremely successful, but recent indicators point to a change in market sentiment as a result of which Phase 6 is now being released in two sub-phases aimed at SME developers.

Phase 1 (Site K):	Barratt Homes - 104 units – on site
Phase 2 (Plots 11-13):	Story Homes – 283 units – on site
Phase 3 (Plots 8 – 10):	Morris Homes – 119 units – on site
Phase 4 (Plots 1-3):	Rowland Homes – 141 units – conditional contract
Phase 6 (Plots 14 & 15):	(sub-divided) - 176 units – currently marketing

The purpose of this Brief is

- (1) to revisit the disposal strategy and masterplan relating to Phase 5 in order to consider whether it can be sub-divided viably to offer in smaller parcels attractive to a wider developer audience, and**
- (2) to then market and dispose of the land in accordance with the advice given.**

2 Scope of the Commission

Phase 5 - Description

Phase 5 is situated in the north-west sector of Cottam Hall between Cottam Way and the backs of housing fronting Hoyles Lane. It is predominantly level land extending to 9.15 ha gross (22.6 acres) (see Site Plan – Annex 1). It is bounded to the west by Homes England land (Phase 4) and Homes England land to the north east (Phase 3). There is a ribbon of Homes England land along the south west boundary that is identified as a landscaping strip in the Illustrative Masterplan (Annex 2); this is the “Riparian Corridor” that forms a key element of the Multi-Phased Development (MPD) Habitat & Maintenance Plan referenced later in this Brief.

Phase 5 is currently actively management as a working farm comprising open fields divided by mature hedges and trees. There is an area of wetland in the centre that is being actively managed for protected species. Phase 3 has been sold on a Building Lease to Morris Homes who are on site, building 119 units. Phase 4 has been sold and is subject to a conditional Agreement for Lease to Rowland Homes to build 141 units. Planning permission was granted on 11th July 2019 so for the purpose of this bid, please assume that the lease will be granted in September 2019.

Access to Phase 5 is currently proposed directly from Cottam Way and indirectly through both Phase 3 (Morris) and Phase 4 (Rowland).

The land and junction off Cottam Way may be affected by the Preston Western Distributor CPO GVD which has been served, however it is not envisaged this will impact significantly on the development of Phase 5, although this must be considered as part of this commission.

Landscaping on Cottam Way was transferred by Homes England to Preston City Council under a Community Related Asset Land Transfer. If required for access or development purposes, Homes England has retained a right of pre-emption / option that is time-limited. This Brief therefore includes the examination of the extent of the adopted highway and the determination of whether this right under the CRA Agreement has to be triggered in order to secure access to Phase 5.

The Commission

Homes England will appoint a Property Consultant to act in (1) a master-planning / advisory and (2) a marketing / disposal capacity to achieve a single phase disposal or multiple phased disposals of Phase 5 commencing in 2020, taking this through to conditional exchange of contract(s) and formal signature of the sale contract / lease until Phase 5 has been sold in its entirety.

The Property Consultant will appoint and work closely with technical (multi-disciplinary) sub-consultants to consider and advise on environmental, ecological, access and planning

issues that will deliver an implementable masterplan and marketing strategy for Phase 5 that achieves:

- Best Consideration
- Delivery at Pace
- Engagement with SME developers
- The promotion of modern methods / off-site construction

Homes England proposes to bring this site, either in its entirety or in the first of several smaller phases, to the market beginning in 2020.

The appointment of the Property Consultant will be for the marketing and disposal of the whole of Phase 5 provided that the Key Deliverables are achieved.

3 Homes England's Approach to Land Disposals

Homes England is tasked by its sponsor, the Ministry for Housing, Communities and Local Government (MHCLG) to *“intervene in the market to ensure more homes are built in areas of greatest need, to improve affordability [and to make] this sustainable by creating a more resilient housing market”*.

Homes England will achieve this by *improving construction productivity and creating a more resilient and competitive market by supporting smaller builders and new entrants* and will seek to facilitate and achieve an increase in pace and the use of MMC to drive quality and create sustainable development.

Generally, Homes England's approach to the disposal of land commences with inviting Expressions of Interest from its Development Partner Panel members, passing through a sifting brief and inviting the short-listed parties to tender (ITT), the successful bidder entering into a conditional (on reserve matters planning) agreement and 125 year Building Lease with performance obligations and overage provisions.

However, the drive to diversify and strengthen the house building sector will require a more flexible approach which will need to be justified by:

- (1) Having an intimate knowledge of local market conditions, developer pipelines and key players;
- (2) Undertaking a comprehensive review of all technical and planning documents to determine the feasibility of multiple partner / multiple phase delivery / accelerated pace and incorporation of MMC.

At Phase 6 Homes England is offering land to the open market ie non-DPP3 developers (Development Partner Panel) on a freehold basis and is receptive to emerging forms of tenure such as PRS and shared ownership to deliver new homes at pace.

There are procurement / delivery consequences of selling to non-DPP3 developers that will need to be considered in making recommendations to Homes England.

4 Key Deliverables

The appointed Property Consultant and its technical team will be required to provide a full range of development land appraisal, marketing, project management and technical services. However, it is anticipated that the Commission will be delivered in three or more stages:

- Stage One – Revised Phase 5 Masterplan Options Analysis (investigatory and advisory);
- Stage Two – Planning Permission to create smaller development parcels;
- Interim Stage (if required) – Designing, tendering and project managing Homes England strategic infrastructure provision;
- Stage Three – Implementing the Marketing and Disposal Strategy;

Stage One – Revised Phase 5 Masterplan Options Analysis

- Produce a refreshed Constraints Plan by reviewing
 - all existing technical information including environmental, geo-technical, ecology, drainage, flood risk, traffic, utility service capacity studies, housing needs surveys, etc..;
 - current planning policies, the original outline planning permission, subsequent reserved matters and detailed planning permissions, s106, s278 and other statutory agreements entered into by Homes England and its delivery partners;
- Undertake a gap analysis to identify where additional surveys, reports, amendments to agreements, etc would be required in order to (a) inform the option analysis and (b) deliver the recommended option(s);
- Prepare cost budget estimates;
- Research the residential land market to identify and quantify current and pipeline development schemes that will impact on the marketability and deliverability of Phase 5 from 2020 onwards;
- Undertake Option Testing for a range of parcel sizes that sit beneath current and pipeline schemes, including limited early market engagement; appraisal testing criteria and which will consider:
 - Adherence to Building for Life 12 principles;
 - Appeal to SME developers;
 - Homes England procurement regulations;
 - New Homes England investment required;
 - Land Receipt;
 - Absolute housing numbers;
 - Pace of delivery;
- Provide detail on a strategy for the number and range of developers who would build out concurrently, and how the market might respond to this;
- Prepare and present a Report and Recommendations which if appropriate supports a revised Disposal Strategy of smaller self-contained parcels capable of independent delivery. The report will identify key action points, milestones and budgetary requirements in support of its recommendations.

Stage Two – Revised Planning Permission and Agreements

- Advise on such additional environmental, geo-technical, ecology, drainage, flood risk, traffic, utility service capacity studies, housing needs surveys, to support a revised planning permission / phasing strategy and to provide indicative costs to implement such work;
- Liaise as necessary with Preston City Council and Lancashire County Council and other statutory consultees;

Interim Stage - Strategic Infrastructure Delivery - If the Stage One Report recommends Homes England makes additional planning applications undertake the strategic infrastructure (eg access road, s278 highway improvements, further GCN mitigation), then there may be an Interim Delivery Stage here (subject to procurement regulations), but **this does not form part of this mini-tender**. If appropriate, the appointed Consultants will be instructed to implement this Interim Delivery Stage based on their hourly rates in the relevant Framework Panel contract.

Stage Three – Marketing & Disposal

- Preparation of EOIs Sifting Brief and ITT;
- Marketing through Homes England's **e-tendering portal**;
- Analysis of sifting briefs and ITTs to determine bidder shortlist / preferred bidder;
- Moderation meetings to shortlist developers;
- Clarification meetings with developers;
- Franking Report and recommendation of preferred bidder;
- Attendance at meetings to provide commercial advice to Homes England in respect of contract negotiations;

NB: Stage Three may be repeated as many times as necessary to complete the disposal of Phase 5 in its entirety – however for bidding purposes tender returns should provide a cost for a single disposal only and each subsequent parcel to be marketed and sold will be rewarded at the same rate as the first parcel.

5 Programme and Timescales

1st August 2019	Issuing mini-tender
30th August 2019	Closing Date for mini-tender
September 2019	Bid Response & Evaluation
October 2019	Preferred Bidder appointed
Nov – December 2019	Stage One delivery
January 2020	Homes England consider report & recommendations
February 2020	Stage 2
May 2020	Parcel No1 – implementation of revised marketing strategy
September 2020	Completion of ITT stage

6 Source Material

Homes England has an extensive portfolio of reports, studies, appraisals and relevant data. For bidding purposes we are not proposing to give access to this resource as some of it is commercially sensitive. However, we have provided below details of relevant planning permissions that can be accessed through the Preston City Council planning portal, giving bidders sufficient information (a) to make this process fair to bidders and (b) ensure their bids are robust.

Figure 1: Preston City Council Planning Portal entries for Cottam Hall North

Planning Applications - 2010 to Present	
Application ID	Address
06/2016/0046A	Land adjacent to Cottam between Hoyles Lane Sidgreaves Lane Lea Road and Lancaster Canal - Cottam Hall
06/2017/1000	Cottam Hall - Cottam
06/2012/0145A	Land adjacent to Cottam between Hoyles Lane Sidgreaves Lane Lea Road and Lancaster Canal - Cottam Hall Lea
06/2018/1073	Cottam Hall - Cottam
06/2019/0020	Land to the south of Hoyles Lane and to Cottam Hall Plots 8-10
06/2019/0146	Land off Cottam Way,

In particular:

06/2012/0145 – Land adjacent to Cottam between Hoyles Lane, Sidgreaves Lane Lea Road and Lancaster Canal

Outline application for the redevelopment of 53 ha of land for residential development of up to 1100 dwellings, (Class C3), retail (Class A1 500 sq m), commercial (Class A3 1600 sq m) and community facilities (Class D1 / D2), children's play areas, open space provision, landscaping and associated infrastructure including internal road layout, footpaths, cycle routes and ecological mitigation measures (all matters reserved).

06/2016/0046 – Sidgreaves Lane, Lea Road and Lancaster Canal, Cottam Hall

Variation of conditions No1 "Approved Plans", No 7 "Code for Sustainable Homes" No 15 "Parking", No 38 "Air Quality Mitigation Scheme" and removal of conditions No 10 (Improvements to M55 Junction 1) and Nos 41 – 70 " Site K" attached to outline planning permission 06/2012/0145.

Ecology

Phases 3, 4 & 5 are subject to an over-riding Mitigation Strategy and Habitat Maintenance Plan:

Cottam Hall North Great Crested Newt Mitigation Strategy – MPD Plan March 2019

Cottam Hall North Habitat Management and Maintenance Plan – February 2019

These two documents written by Aecom describe the current distribution of GCN at Cottam Hall North identifying a medium-sized meta-population and proposing a strategy to mitigate potential impacts associated with the development of these phases on this population. In

developing Phases 3 and 4, Natural England have issued Mitigation Licences to Homes England based on these or earlier editions of these documents which must be adhered to.

Indicative habitats within Phase 5 (referenced as Phase 3 in these reports) are identified, plotted and described in the plan attached as Annex 3. Both reports are available on the e-tendering portal.

Re-masterplanning the disposal strategy will require absolute adherence to these Mitigation Licences and the Mitigation Strategy and Habitat Maintenance Plan on which they are predicated or propose alternatives that will be acceptable to Natural England / the local planning authority and the target SME developer market.

7 Homes England's Technical Partners

Homes England has a Framework Panel of technical consultants who have met our exacting standards in terms of professionalism, service provision, indemnity insurance and value for money – a list of MD Consultants **on our North Lot** is provided at Annex 4; contact names and details can be provided on request.

Property Consultants are invited to make their own their own partnering arrangements with their preferred Technical Consultants; these consultants do not have to be from our Panel but must evidence their technical abilities and expertise to a similar standard and have requisite insurance cover.

The appointed Property Consultant will be the lead consultant in the arrangement and will take ownership of the initial Options Analysis Report; the Technical Consultant will act as sub-contractor to the Property Consultant. If a subsequent Interim Stage: Infrastructure Provision is progressed, this will be contracted independently of this instruction directly with the MD Consultant.

8 Tender Response & Scoring

Your response must be submitted via the e-tendering portal (ProContract).

All requests for further information in respect of this Mini-competition must be sent using ProContract. No approach of any kind should be made to any other person within, or associated with, Homes England.

Clarification Procedure

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 response will be communicated, in a suitably anonymous form, to all prospective Suppliers who have responded.

All responses received and any communication from Suppliers will be treated in confidence but will be subject to the above.

Please note

- All communications during the tender period will be via the ProContract website;

- All bidders 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;
- 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.

Tenders will be weighted as detailed below.

- Quality (50%)
- Price (50%)

Tenderers are expected to provide the following information in response to this ITT:

- Response Proforma (Annex 5)
- Proposed programme outlining key activities and milestones
- Resource schedule inclusive of daily fee rates
- Supporting CV's for staff proposed to undertake this commission (no more than 2 pages)

Scoring Criteria – Quality (50%)

The consultants answer to each of the requirements/questions will be scored using the scoring principles below:

Quality will account for **50%** 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 Satisfies the requirement with minor reservations. Some minor reservations of the Supplier's understanding and proposed methodology, with limited evidence to support the response.

1 - Serious Reservations/Non-compliant Satisfies the requirement with major reservations. 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 AND THEREFORE YOUR PRICING WILL NOT BE SCORED.

No.	Criteria	Demonstrated by	Weighting
1	<p>Proposal <i>Provide a statement to explain how this commission will be undertaken, demonstrating a detailed understanding of the inter-relationship between technical and market issues, Homes England land disposal / procurement criteria and in particular how experience and innovation can add value to the process.</i></p> <p><i>Statements should be no longer than 800 words.</i></p>	<ul style="list-style-type: none"> • Statement outlining method and approach explaining how the commission will be undertaken; • Details of your in-house or proposed MD / technical consultants contracting arrangements; • Schedule of services to be delivered by lead- and sub-consultants; • Information on input that may be required from Homes England • Identification of other information that may be required • Where relevant, identification of areas of innovation • Where appropriate identify the potential impact of external influences and stakeholders • Other commentary on the brief 	25%
2	<p>Previous Relevant Experience <i>Provide other recent examples of sites you have master-planned, devised a disposal strategy and subsequently successfully marketed, highlighting any similarities with Cottam Hall or lessons learned which will benefit the project.</i></p> <p><i>Statements should be no longer than 400 words.</i></p>	<ul style="list-style-type: none"> • Provide relevant experience of (1) master-planning complex residential development sites with multiple constraints and evidencing market-facing solutions; (2) preparing planning and disposal briefs for sale by formal tender and their subsequent successful disposal; (3) demonstrating knowledge of procurement issues faced by Homes England; • Examples of related experience that will add value to this commission, supported by relevant examples where applicable; • Information and evidence to support knowledge and experience of the local property market. 	15%
3	<p>Proposed Staff and Resources <i>Describe who will undertake this commission and the proportion of each member of team's time that they will they devote to it.</i></p> <p><i>Statements should be no longer than 400 words.</i></p>	<ul style="list-style-type: none"> • Who will undertake the commission? • Who will be responsible for reporting to the Client? • Who will manage the team? • Identify key members of staff and allocation to the required services • How much time will they devote to it? 	10%

		<ul style="list-style-type: none"> Resourcing information provided in a Resource and Pricing Schedule Supporting CVs for key members of staff 	
4	Programme & Management	<ul style="list-style-type: none"> Provide a programme to demonstrate the timings by which key milestones across this commission will be achieved. 	Pass/ Fail

Worked example of how criteria under quality will be used to calculate a score

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	3	25%	5	15	33
	2	4	15%	3	12	
	3	3	10%	2	6	
	4	Pass	n/a	n/a	n/a	
Supplier B	1	5	25%	5	25	45
	2	4	15%	3	12	
	3	4	10%	2	8	
	4	Pass	n/a	n/a	n/a	
Supplier C	1	2	25%	5	10	Fail*
	2	1	15%	3	3	
	3	2	10%	2	4	
	4	Fail	n/a	n/a	n/a	

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

Scoring Criteria – Price (50%)

Based on the scope of this commission, the tenderers price must cover and clearly articulate the following;

- People
- Tasks to be delivered
- Time
- Hourly rates (fully inclusive of daily expenses)

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	$350/350 = 100\%$	$100\% * 50 = 50$
Supplier B	700	$350/700 = 50\%$	$50\% * 50 = 25$
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	33	50	83	1

Supplier B	45	25	70	2
Supplier C	Fail	n/a	Fail	n/a

The lowest overall total price will receive a score of 50. The other totals will be scored in relation to how much more expensive their price is than the lowest price.

Owing to the nature of the selection process, the decision of Homes England is final. No subsequent correspondence will be entered into, although Homes England will seek to offer constructive feed-back to unsuccessful parties. Agreement to these criteria is a pre-condition of entry to the tender process. There will be a contract for the selected consultant based on the terms and conditions each has already accepted for appointment to the Homes England Panel.

The successful consultant will be appointed under Homes England panel arrangements. Project meetings will be held when appropriate based upon progress within the project and decision making.

9 ITT Timescales

The deadline for the receipt of responses is 13:00 on Friday 30th August 2019. Your response must be submitted via the e-tendering portal (Pro-Contract).

It is intended to proceed with the appointment 1 week following the receipt of submissions.

An Inception Meeting will be held the week following Homes England's appointment of a Lead Consultant; the meeting will take place at Homes England's offices in Birchwood. Consultants should confirm availability for all key members of their team for this week. If unavailable on these days Consultants should confirm next available dates.

10 Background Documents/Supporting Information

A series of reports have been compiled to support the de-risking of the site (site investigations, habitat surveys, flood risk assessments, highways studies etc.) and these will be made available to the successful candidate.

11 Ownership of Outputs

All data produced as a result of this commission will remain in the ownership of Homes England once the commission is finished.

12 Follow on Work

As above, it may prove necessary to re-engage the appointed company to undertake further work beyond this direct commission.

13 Termination

Should performance during the period of this appointment prove unsatisfactory the Homes England will exercise its right under the panel appointment of Consultant Guidance 2010 to give notice to terminate the arrangement without giving reasons with immediate effect.

14 Confidentiality

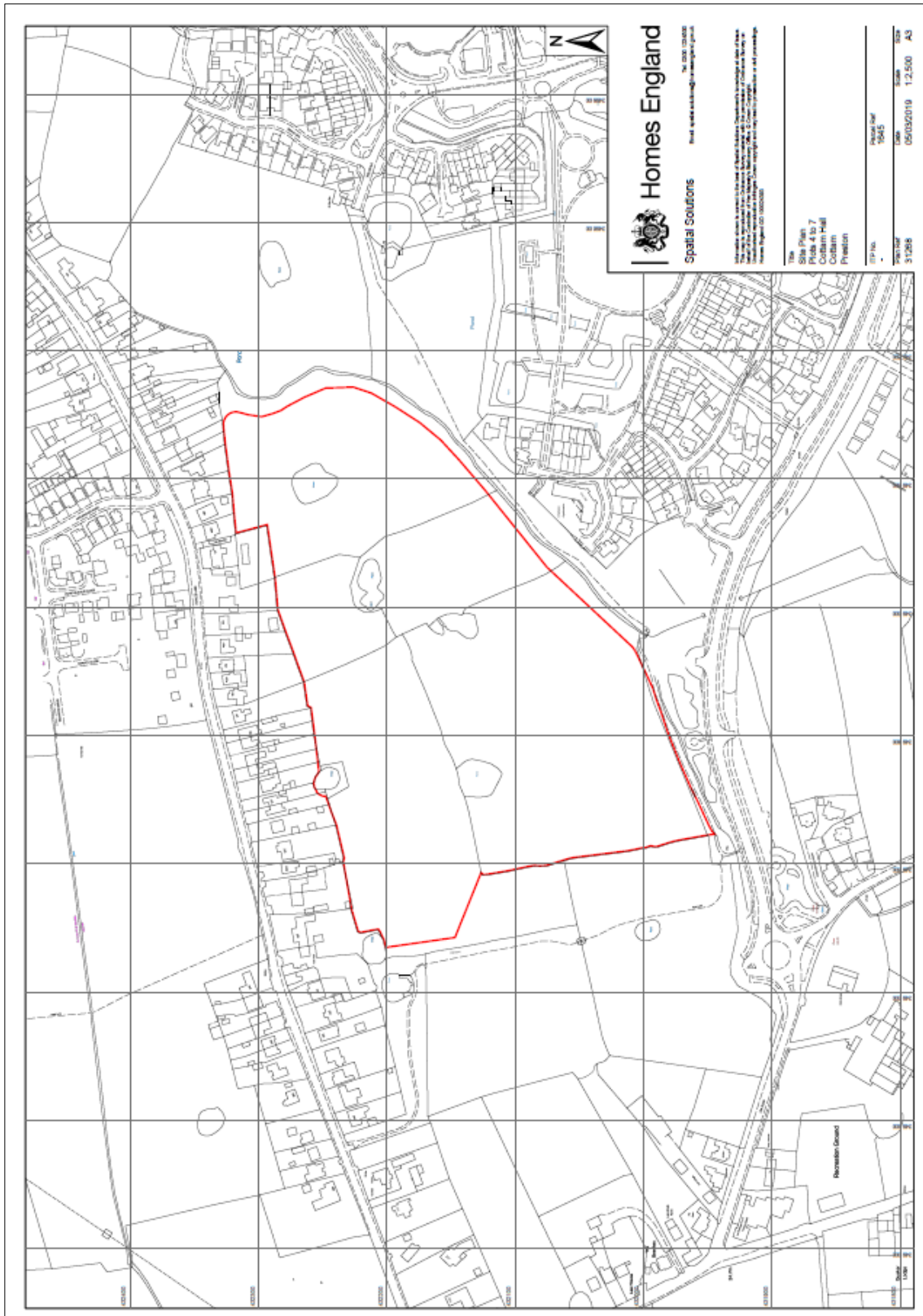
All information supplied by Homes England in connection with this Invitation To Tender shall be treated as confidential by prospective tenderers and shall not be revealed at any time to any person (including any Organisation) except for the purposes of the preparation and submission of this tender or the performance of any contract entered into by the Homes England pursuant to any such tender.

Homes England requires a clear understanding that there are no conflicts of interest in representing Homes England on this project. If there is any likelihood of potential conflicts of interest then this needs to be disclosed, and the steps to mitigate or eliminate the conflict should be explained.

15 Transparency

This procurement and award is subject to the transparency arrangements being adopted by the UK Government. These arrangements include the publication of tender documentation issued and the contract between Homes England and supplier.

ANNEX 1 – Site Plan



For identification purposes only
Not to Scale

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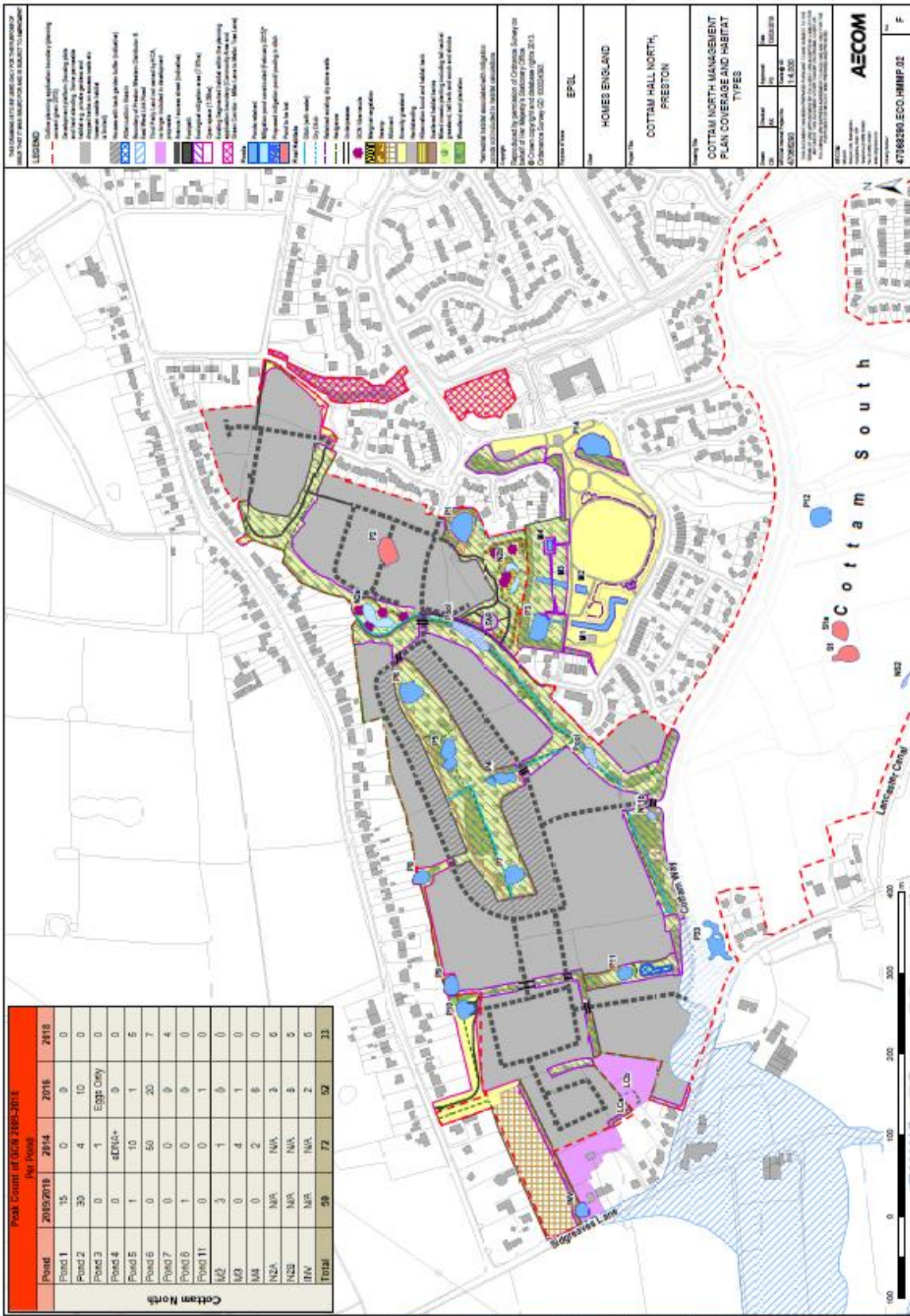
ANNEX 2 - Masterplan



Atkins Framework Masterplan 5091095/200/101/B

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ANNEX 3 – HABITAT MANAGEMENT PLAN



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ANNEX 4 - Homes England's Technical Consultants

Homes England Multidisciplinary Technical Services Framework 2019-2023

Framework Suppliers

- AECOM Limited
- Amey OW Limited
- Arcadis Consulting (UK) Ltd
- Atkins Limited
- BDP
- Curtins Consulting Limited
- East Hampshire District Council – RegenCo
- Gleeds Advisory Ltd
- GVA
- Jacobs U.K Limited
- Karakusevic Carson Architects LLP
- Mace Limited
- Ove Arup & Partners Ltd
- Pell Frischmann Consultants Ltd
- Peter Brett Associates LLP
- Tibbalds Campbell Reith Joint Venture
- Turner & Townsend Project Management Limited
- Wood Environment & Infrastructure Solutions UK Limited
- WSP UK Ltd
- WYG Engineering Limited

ANNEX 5 – Response Pro forma

Response required by 1.00pm Friday 30th August 2019	
Response to invitation to participate in a Mini-competition	
Panel:	Property
Project:	Property Services, Land at Phase 5, Cottam Hall, Preston
Tenderer:	
Date:	
To:	From:
1 Proposal (25%) <i>Provide a statement to explain how this commission will be undertaken, demonstrating a detailed understanding of the inter-relationship between technical and market issues and in particular how experience and innovation can add value to the process. Statements should be no longer than 800 words.</i>	
2 Previous Relevant Experience (15%) <i>Provide other recent examples of sites you have master-planned, devised a disposal strategy and subsequently successfully marketed, highlighting any similarities with Cottam Hall or lessons learned which will benefit the project. Statements should be no longer than 400 words.</i>	

3 Proposed Staff and Resources (10%)

Describe who will undertake this commission and the proportion of each member of team's time that they will devote to it.

Statements should be no longer than 400 words.

4 Programme & Management (Pass / Fail)

Provide a programme to demonstrate the timings by which key milestones across this commission will be achieved.

Fee Proposal (50%)

Provide a fee proposal for completing the commission, ensuring that a full breakdown of individual staff charges and other costs are included.