



Homes  
England

Making homes happen

Multi-Disciplinary Panel  
Further Competition Invitation to Tender

Hartley Gardens, Clacton on Sea

Issue Date: 27<sup>th</sup> July 2022

Pro-Contract Identification Number: DN 593252



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# Invitation to Tender

Homes England Multi-Disciplinary Panel - Further Competition Invitation to Tender (Stage 3 Over FTS Threshold / Stage 1 Under FTS Threshold)  
Hartley Gardens, Clacton on Sea

## Introduction

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

**Please read the information and requirements contained within this ITT carefully as some requirements have changed following Sifting Brief stage.**

We ask you to respond to the questions detailed in Part 2, Section 8 (Evaluation Criteria) using the Response Form and to return the Response Form and Resource and Pricing Schedule in Part 3 with your tender.

This Further Competition ITT is divided into 3 parts:

### Part 1 – Commission Requirement

- Details the commission requirements.
- Details additional terms and conditions for the Further Competition. The successful Supplier will be subject to both the terms and conditions of this Further Competition and the Framework Contract. Unless otherwise defined in these instructions, terms used shall have the meaning given to them in the Framework Contract.

### Part 2 – Instructions for Submitting a Response

- Contains important information and instructions on preparing and submitting a tender response. Please read these instructions carefully prior to submitting your tender response.
- Outlines the evaluation criteria which will be used for assessment. It is important that Suppliers familiarise themselves with the criteria and ensure they are considered when compiling their tender response.

### Part 3 – Standard Forms

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

# Part 1 – Commission Requirements

## 1. The Commission

The purpose of this Invitation to Tender is to award the call-off contract for the above project. We ask you to respond to the questions detailed in the Evaluation Section below using the Response form and to submit your pricing using the Resource/Pricing schedule provided.

The contents of this brief should be treated on a strictly confidential basis and should not be disclosed beyond the immediate team involved in the preparation of any response. Please see Chapter 13 'Duty of Confidentiality' in the Multi-Disciplinary Framework Panel Contract for details of agreed confidentiality.

The purpose of this commission is to appoint a multi-disciplinary team to deliver the project objectives, acting as Principal/Lead for any sub-contractors. This commission will comprise multiple workstreams to address the planning; communication; masterplan design; landscape; technical design, infrastructure works; economic, cost control and delivery; and overall project management and co-ordination of the project.

The project objective is for Homes England (HE) work in collaboration with Greenwich Hospital (GH) and appointed project team to:

- a. Promote the Hartley Gardens Allocation for early delivery;
- b. Support and engage with Tendring District Council (TDC) in the preparation of the Hartley Gardens Supplementary Planning Document (SPD),
- c. Lead on the preparation and co-ordination of a Strategic Framework Masterplan for the Hartley Gardens allocation working with all relevant parties and stakeholders; and
- d. Obtain Outline Planning Consent on land owned by HE and GH (the 'site') to accelerate and unlock the delivery of high-quality new homes for Hartley Gardens.
- e. Secure Masterplan and support the Planning Agreement together with any relevant Statutory Agreements which set out the requirements for contribution to the early delivery of strategic infrastructure.
- f. To support the accelerated delivery of infrastructure on and outside the site through identifying opportunities for infrastructure investment.
- g. Provide Advice and review of project viability for GH and HE at key milestones of the project and options for delivery of any permitted development to ensure that financial receipts are maximised.

It is anticipated that the SPD and strategic framework masterplan will cover the entire Hartley Gardens allocation area 'the allocation area', but the outline planning application will refer only to land owned by GH and HE 'the site'. Engagement and collaboration with various land interests will be key to the success of this appointment.

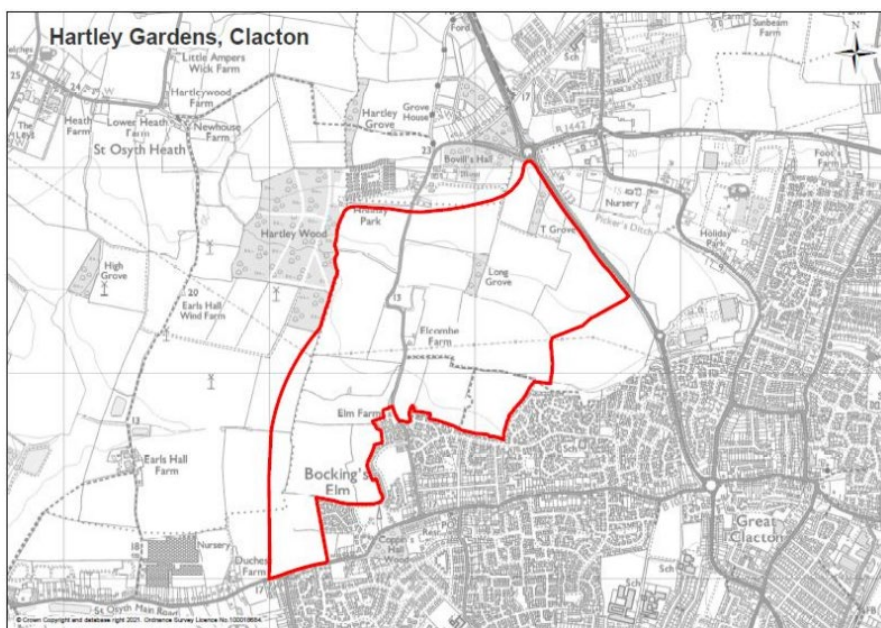
Heads of Terms have been agreed between GH and HE on a Collaboration Agreement, and it is expected that the agreement will be in final form prior to appointment of a multi-disciplinary team.

## 2. Site Information

### Allocation Area

The proposed development site is located to the north of Clacton-on-Sea in Essex. The wider allocation area is allocated in the Local Plan (Tendring District Local Plan 2013-2033 and Beyond Section 2) under Policy SAMU2 (Hartley Gardens) which sets out the overall vision for the site. Tendring has an affordability ratio of 8.49 and is identified as a Priority Area for the Levelling Up Fund 2.

The area covered by the site allocation is shown on the image below:



The SAMU 2 Hartley Garden allocation spans approximately 160ha of land, of which 107ha is primarily under the control of HE and GH. A copy of the wording of Policy SAMU2 can be found at Appendix 1.

Hartley Gardens is located on the north-western periphery of Clacton-on-Sea, a seaside town with a population of circa 57,000 people (as at 2016). The allocation is 2.5km from the town centre which has a wide range of facilities retail, education, leisure (the beach) and employment and good public transport accessibility including a railway station. To the southern boundary of the allocation, on Legerton Drive, there is a neighbourhood centre which includes a small community centre and local Sainsburys as well as Cann Hall Primary School.

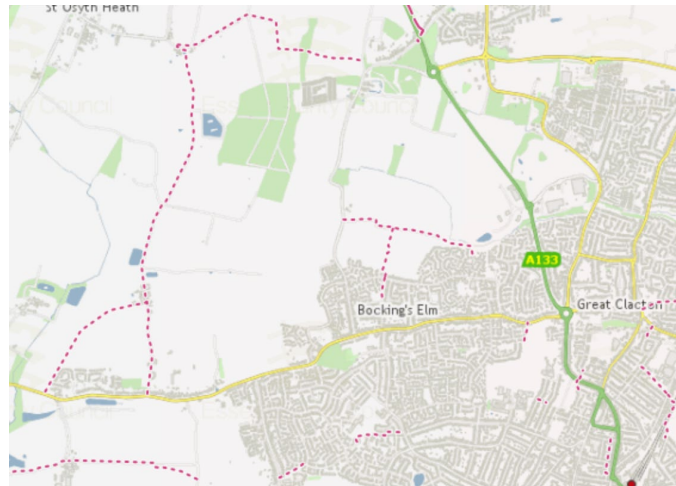
Hartley Gardens comprises farmland with fields of varying sizes with dividing hedgerows and small areas of priority habitat deciduous woodland, including T Grove to the north and Long Grove towards the centre.

Little Clacton Road bisects the allocation, north to south, providing access to agricultural fields and the surrounding road network, the A133 in the north and St John's Road (B1027) to the south.

There are two existing buildings within the allocation, Elm Farm and Elcombe Farm. These are located along Little Clacton Road, with Elm Farm located along the southern boundary and Elcombe Farm within the centre of the allocation.

Overhead electricity pylons run east to west across the allocation.

A Public Right of Way crosses the eastern section of the allocation, starting from Little Clacton Road and crossing eastwards until Abinger Close and Dorking Crescent. The location of the PRow can be seen on the following image, illustrated by the dotted line:



Hartley Brook extends through Hartley Woods, west to east across the Site, to Pickers Ditch in the southeast corner.

The built-up edge of Clacton forms the southern boundary with an indicative western boundary linking the B1027 in the south to the A133 in the north. This boundary comprises hedgerow and open countryside with open valley views. To the northwest of the allocation is Hartley Wood an area of ancient woodland and a Local Wildlife Site. To the west lies Earls Hall Wind Farm comprising of five large wind turbines.

To the east, the allocation boundary abuts the A133 and Brook Park West a mixed-use development comprising a Lidl, hotel, pub and fast-food restaurant and up to 200 homes (granted outline consent under planning reference: 18/01616/OUT). Early phases are now largely built out. The 200 homes benefit from Reserved Matters consent (planning reference: 19/01945/OUT) and are expected to be delivered between 2021 and 2028.

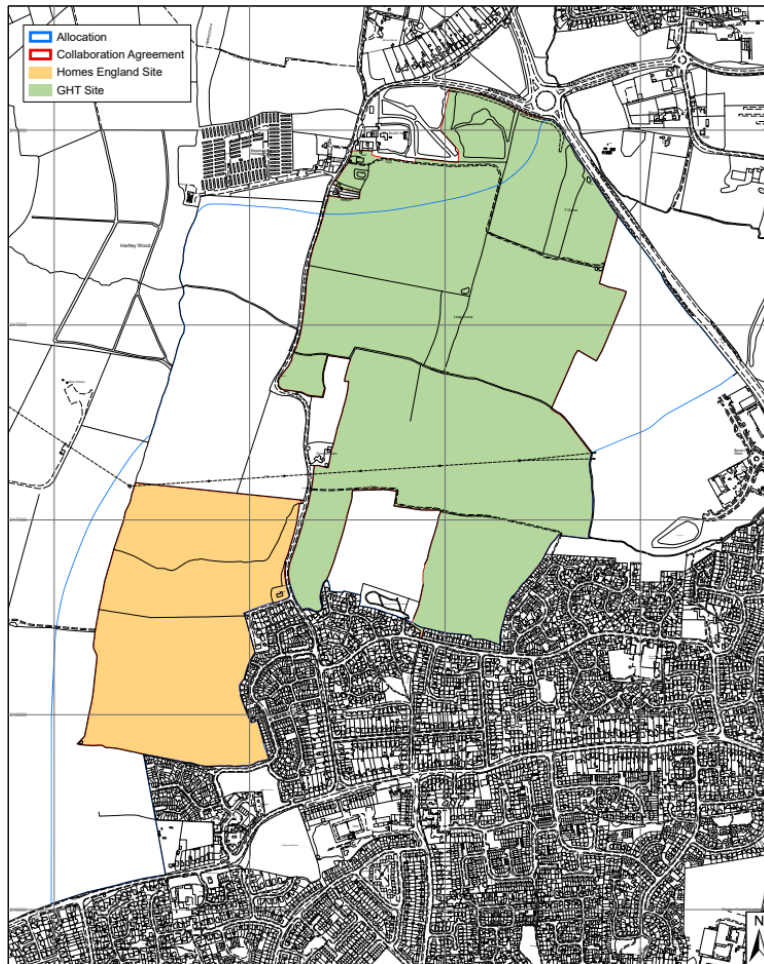
#### The Site

Homes England acquired a portion of the allocation area comprising 30Ha (shown in orange in the plan below) in early 2022 with the objective of resolving market failure and unlocking the delivery of housing through collaboration with GH and (potentially) other landowners within the site allocation area. The Homes England land and Greenwich Hospital's land combine to form 'the site'. The two land areas are intersected by Little Clacton Road which is a 40mph country road.

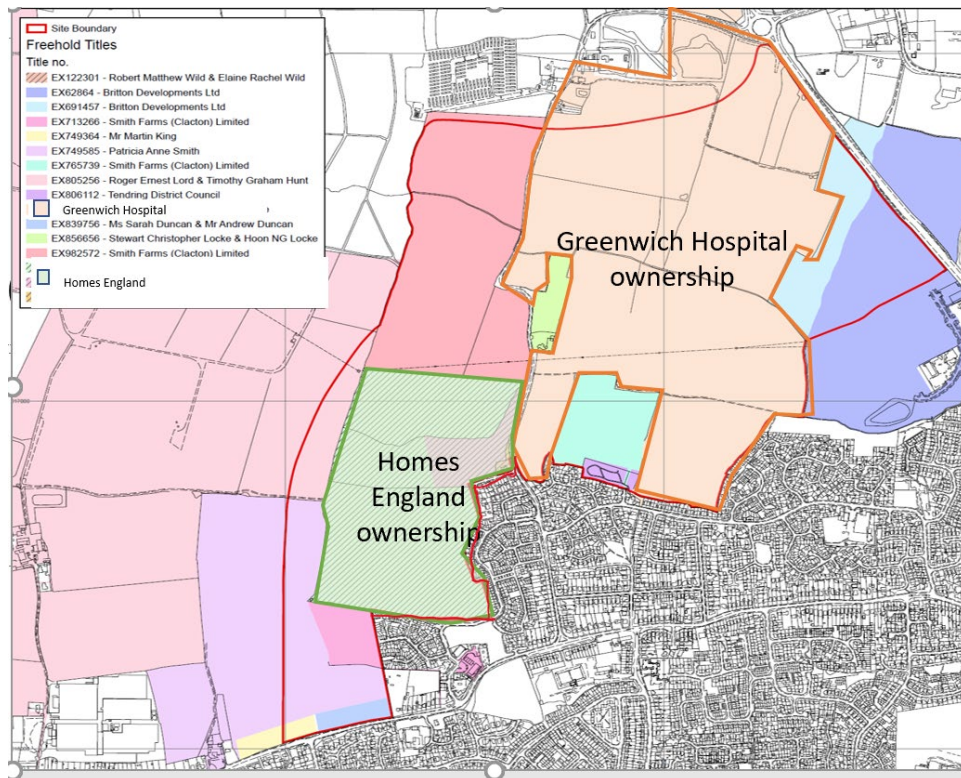
Homes England's land is shown in orange in the plan below. It comprises three agricultural fields, divided by hedgerow and Elm Farm, an existing dwelling that sits within the eastern boundary. To the northeast the site abuts Little Clacton Road and to the southeast, the rear curtilage of residential properties along Elm Farm Drive (a development of 14 bungalows constructed in 2019) and Legerton Drive. It should be noted the planning permission for Elm Farm Drive includes a SuDs scheme which incorporates an attenuation basin within the south-eastern corner.

GH's land is shown in green in the plan below. The land comprises approximately 77Ha and is part of an historic parcel of land ownership GH since 1892. The land comprises six agricultural fields also divided by hedgerows with areas of dense woodland. Smith's Farm projects into the southern portion of GH's land.

The following image shows the various landholding and the extent of the allocation:



The remaining parcels are owned by a range of local farmers, private individuals and a developer as per the title plan below:



### 3. Site Ownership and Governance

The allocation area is in a mix of ownerships as shown on the plan above. Despite the allocation area now being included in the local plan and efforts from several individuals over a 17-year period to bring forward development, there has been no co-ordination between landowners for the promotion of the area or its delivery. TDC are seeking a co-ordinated and comprehensive approach to delivery supported by key elements of early infrastructure.

GH are a Crown Charity, and the Hospital provides charitable support including annuities, sheltered housing and education to serving and retired personnel of the Royal Navy and Royal Marines and their dependants.

HE and GH are working in partnership and parties will shortly be entering into a Collaboration Agreement for the wider project. This confirms all roles and responsibilities of collaboration partners. It is hoped this will be signed around the time of appointment of this tender.

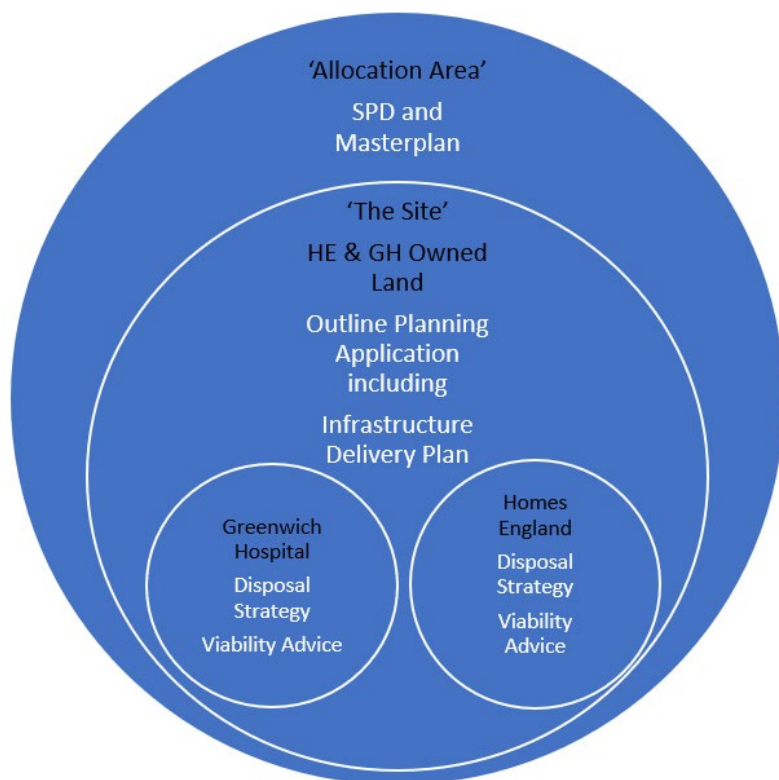
The Collaboration Agreement confirms the following:

- HE to lead on all planning promotion activities and the appointment and supervision of the Project Team; GH will enter into planning and statutory agreements to facilitate the development subject to viability assessments provided by the appointed Multi-Disciplinary consultant team (MDT).
- The parties will establish a Project Board made up of key personnel from HE and GH responsible for progressing and approving the planning strategy and discussing any strategic matters and decision taking relating to the project. An appointed member of the MDT will advise members of the Project Board.
- Homes England and GH to establish a Project Delivery Team (up to grant of planning permission) who will oversee, co-ordinate and manage the day-to-day overall delivery of the project and input from the multi-disciplinary consultant team.

The appointment will be via the Homes England Multi-disciplinary Framework and will be an appointment by HE with collateral warranties and reliance over all information being provided to GH. Both parties will be scoring the tenders (see part two below for more details). Both parties will also be represented as clients in project team discussions.



The diagram below shows how it is anticipated that the commission will work and the key deliverables:



HE will fund the consultant fees with proportionate costs to be recoverable from GH as per the Collaboration Agreement

HE and GH have agreed that as part of the Collaboration Agreement there will be periodic review points where both parties will assess progress to date and determine next steps. These milestones are as follows:

- a. the date upon the Parties have prepared and approved the form of the Master Plan;
- b. the date of approval of the Master Plan by the Local Planning Authority;
- c. the date upon which Homes England shall prepare a draft Planning Application in accordance with this [Collaboration] Agreement.

The contract will be with HE via the Homes England Multi-Disciplinary Framework Panel, with both parties represented as clients as per the Collaboration Agreement, should GH seek to withdraw from the arrangement, HE will continue the client role for the duration of the appointment.

In the unlikely event of GH seeking to withdraw from the collaboration agreement at any milestone as per above, or at other points in the project lifecycle, HE will remain the client for the commission. In this event it is possible that HE will be required to reduce the scope and number of homes within the outline planning application to delivery on the land it owns and directly controls. See section 9 below for details of how this will be dealt with in terms of pricing and appointments.

## 4. Planning Overview

### Local Plan Allocation

The HE and GH land forms part of a wider strategic site allocated in the newly adopted Tendring District [Local Plan 2013-2033 and Beyond Section 2](#) under Policy SAMU2 (adopted Jan 2022). HE and GH have commenced working alongside TDC to develop a Supplementary Planning Document and lead the preparation of a Masterplan for the allocation. An outline planning application shall be made for the land controlled by Homes England and Greenwich Hospital, working in conjunction.

Policy SAMU2 sets out the overall vision for the site, including the provision of 1,700 units (30% to be affordable), 7ha of land for employment and other necessary infrastructure provision, such as a two-form entry primary school, early-years, and childcare facilities; healthcare (either onsite or financial contribution); and open space/parks/allotments. A full copy of Policy SAMU2 can be found at Appendix 1.

To deliver Hartley Gardens, SAMU2 seeks to ensure development is brought forward as part of a comprehensive master-planned approach, to be set out in a site-specific Supplementary Planning Document (SPD) or comprehensive masterplan which will need to be prepared for approval by the Council.

The purpose of the SPD or masterplan will be as follows:

- a. provide further detail on the geographical extent and boundary of the allocation, ensuring a defensible and sensitive boundary to the open countryside beyond;
- b. ii. provide the means to inform, assess and determine planning applications and secure comprehensive, co-ordinated and integrated sustainable development which is viable for the respective parties; and
- c. iii. facilitate and support the co-ordination and timely delivery of the green, social and physical infrastructure necessary to facilitate growth in this location.

The above requirements aim to ensure the comprehensive and co-ordinated development of the site, to ensure the master-planning principles set out within SAMU2 are addressed and to provide a clear delivery plan to ensure the right infrastructure is funded and delivered at the right place and at the right time.

The local plan evidence base can be found here ([click link](#)): [View the technical studies and background evidence supporting the new Local Plan | Tendring District Council \(tendringdc.gov.uk\)](#)

### Planning Performance Agreement

Initial discussions with TDC about a Planning Performance Agreement (PPA) to be co-signed by HE and TDC are underway, and it is anticipated that this will be signed off once the appointed multidisciplinary team are in place.

### Planning History

Planning permission has not been granted on the site for residential development. Development at Hartley Gardens has always been an aspiration of the LPA but in the past has failed to make positive progress due to co-ordination failure in the market.

It is also worth noting that despite the above consent has been granted for neighbouring sites. Details are as follows:

- Outline Planning consent has been granted at Elm Farm for a residential development of 14 dwellings (under planning reference: 16/00740/OUT, allowed at appeal – ref: APP/P1560/W/16/3164552). However, the consent has now lapsed as a reserved matters application has not been sought and the timeframe for such submissions has now passed.

- Elm Farm was then granted consent under planning reference 18/00662/FUL (as amended by 20/00155/FUL) for 14 bungalows. It appears that works have been undertaken to implement this scheme.
- Adjacent to the site consent has been granted for a development of 200 dwellings under planning reference: 16/01250/OUT (as varied by (22/00378/VOC) with reserved matters consent being granted under 19/01945/DETAIL. This sits outside the redline boundary for the proposed site; however, will be relevant for the design approach along the boundary between the two sites.

The following are other notable local major residential applications and appeals:

- APP/P1560/W/19/3239002 – Land at Foot Farm, Thorpe Road, Clacton-on-Sea: Planning appeal for the erection of up to 245 dwellings. Dismissed – 25 August 2020
- APP/P1560/W/20/3256190 – 700 St Johns Road and St Johns Nursery site, Earls Hall Drive, Clacton-on-Sea: Planning appeal for the erection of 195 residential units. Dismissed – 7 January 2021
- 21/01000/FUL – St Johns Plant Centre Earls Hall Drive Clacton-on-Sea: Planning application for the erection of 180 residential units. Pending determination – decision due 1 October 2021. The application was presented at Planning Committee with a recommendation for approval on the 30th March 2022. It was resolved that consideration of the application be deferred in order to allow ECC Highways officers to attend a future meeting of the Planning Committee whereby they can be present to answer Members’ technical and highway specific questions and to clarify traffic data used in the transport assessment. In addition, Officers were instructed to request the applicant to look at their proposal against policies SP7, SPL3, LP4 and LP5 and submit changes if required.
- 18/01800/DETAIL - Oakwood Park Land to The East of Thorpe Road Clacton-on-Sea: Reserved matters application for 250 dwellings pursuant to outline planning permission 12/01262/OUT (as varied by planning permission 15/01781/OUT). Application by Persimmon Homes Ltd and Britton Developments Ltd approved – 5 July 2019. (NB. Local Plan allocation SAMU3 Local Plan lies on land to the immediate east).
- 17/01229/OUT - Land adjacent and to the rear of 755 and 757 St Johns Road Clacton-on-Sea: Outline application for up to 950 residential units. Pending determination (see also: 19/01660/EIASC. Pending Determination). This site is allocated under Policy SAMU4: Development at Rouses Farm, Jaywick Lane, Clacton
- 20/01416/DETAIL - Land Northwest of Sladbury’s Lane, Clacton-on-Sea: Reserved matters application for residential development up to 132 dwellings. Approved – 29th October 2021.
- In addition, it is worth noting SAMU3 – Oakworth Park, Clacton (located north of Clacton-on-Sea, between Holland Road and the Oakwood Business Park): This site is identified for the allocation of approximately 900 new homes, alongside a new local neighbourhood centre, primary school and health care facilities. A pre-application request has been submitted in respect of proposals for approximately 885 dwellings plus care units and other community infrastructure at the site (21/30069/PREAPP).

## 5. Constraints and Considerations

### Access

At present the site is bound by the A133 on the eastern edge, St John’s Road runs along a small section of the southernmost perimeter edge. Little Clacton Road intersects the site and leads into St Osyth Road. There is a public right of way from Little Clacton Road, running alongside Elcombe which splinters and connects to Clacton at two separate points.

The nearest bus stops to the site are provided along Legerton Drive to the south of the site. These are currently served by bus services 7 and 135 providing access to Seawick and Clacton every 60 minutes. In addition, service 3 runs along Little Clacton Road providing a connection between Clacton and Harwich up to every 60 minutes.

The nearest Railway station to the site is Clacton-on-Sea located approximately just over 2km from the nearest part of the allocation area, along the south. Clacton-on-Sea is served by Great Anglian Railways and provides a connection to destinations including Colchester, Chelmsford and London Liverpool Street. Services to these destinations run every hour during peak hours. The station provides 128 cycle parking spaces and a car park with 49 spaces.

There are no major road improvements or committed schemes highlighted in the current Essex County Council Local Transport Plan (ECC LTP) dated 2011 for the Clacton area, with the focus on promotion of sustainable transport measures across the town. Improvement works were undertaken by ECC in 2020 on the A133 corridor at the Frating and Weeley Roundabouts between Colchester and Clacton to improve journey time reliability along this corridor.

A key part of the masterplanning element of this commission will be to establish how the access onto and through the site will work and what the phasing strategy is for delivering this.

A comprehensive network of walking, cycling and greenway routes will need to be provided internally across the site, as well as providing connections beyond the site. Access towards the facilities and services of Clacton on Sea will be important along with access to Jaywick Sands to the southwest, Little Clacton to the north and Great Clacton to the east.

The SAMU2 allocation identifies a need for:

'A sustainable movement network, including principal points of highway access, a hierarchy of streets, facilitating public transport and prioritising the connection of walking and cycling routes within the site and beyond' and 'create a series of permeable and legible well-defined streets which prioritise cycle and pedestrian routes which link into the existing built-up area and local facilities (e.g., retail and schools)'

Whilst the explicit requirement for a link road to be provided has now been removed from the Policy, it is still anticipated some form of strategic connection will be required and planned for from the A133 to the western side of Clacton.

Traffic Surveys were undertaken in December 2021. The survey suggests that Progress Way/ A133 Roundabout operates within capacity and is predicted to be able to accommodate the development as the existing arrangement or to provide access to the development via a realignment of St Osyth Road. The St Johns Road / A133 Roundabout is predicted to operate over capacity in the development scenario in the AM peak hour, so mitigation is likely to be required to accommodate the development. Modelling undertaken as part of the survey work shows that the Little Clacton Road / St Johns Road could accommodate 200-300 dwellings before reaching capacity if all traffic heading south from the Homes England land travels through the junction. If 15-20% of traffic is reassigned to Constable Avenue the current junction could support the 523 units. However, ECC are yet to agree the reassignment of trips and further work will be required. A copy of the Traffic Survey will be made available on appointment. It is noted that a more detailed traffic assessment will need to be undertaken as part of a Transport Assessment to support a future application.

## Heritage & Archaeology

Within the study area surrounding the allocation area, no World Heritage Sites, Scheduled Monuments, Protected Wreck Sites, Registered Battlefields or Conservation Areas were noted in the completed searches. There are records of Listed Buildings in the near vicinity of the site, in addition to clusters of structures within Great Clacton.

In terms of heritage assets, it is noted that the Topic Paper prepared by Tendring identified a number of listed buildings that may be impacted by the development. This included Bovills Hall a C15/C16th century house is a Grade II listed building to the direct north of the site off St Osyth's Road in Little Clacton (List Entry: 1111510). This area includes an original moat and an extensive area of planting. The Topic Paper also identified Grade II Duchess Farmhouse, which is located to the southwest of the site off St Johns Road (List Entry: 1111511). It should be noted that the Council has commissioned a further Heritage Impact Assessment in partnership with Colchester Borough Council, which will provide a more detailed assessment of this site, and others, following the advice of Historic England.

The following provides a non-exhaustive list of further listed buildings of note in the locality of the allocation area:

- Barn approximately 30 Metres Northwest of Bovill's Hall (Grade II) - List Entry: 1309179
- Pig Sties Approximately 50 Meters West of Bovill's Hall (Grade II) - List Entry: 1111511
- Cann Hall (Grade II\*) - List Entry: 1111549
- House Believed to be Known as Earls Hall Lodge (Grade II) - List Entry 1309075
- Bluehouse Farmhouse Adjacent to East of Clacton Garden Centre (Grade II) - List Entry 1337149
- Stone Hall (Grade II) - List Entry 1165889

## Ecology

Hartley Gardens falls within the Zone of Influence for a number of European Habitat Sites including the following statutory nature conservation designations: Colne Estuary Special Protection Area (SPA), Ramsar and Site of Special Scientific Interest (SSSI); Essex Estuaries Special Area of Conservation (SAC); Hamford Water and Blackwater Estuary SPA, Ramsar and SSSIs. The allocation is also within 1km of five non-statutory designated Local Wildlife Sites (LoWS)/Special Roadside Verges (SRVs).

The Council's Habitat Regulations Assessment has identified Hartley Gardens as having moderate suitability to support golden plover and lapwing (SPA Birds).

The Council has an obligation under the Essex Coast Recreational Disturbance Avoidance and Mitigation Strategy (RAMS) to ensure that either alone or in-combination effects of residential development on European Designated Sites are effectively mitigated.

In accordance with the Essex Coast RAMS SPD, the Council has confirmed a financial RAMS contribution, which is currently approximately £127/dwelling (index linked) will be required to mitigate the impact of any development at Hartley Gardens on the SAC.

There is a need for natural open space on the site, this may be in the form of a Suitable Alternative Natural Greenspace (SANG), to attract recreational use away from under-pressure protected natural habitats nearby. However, the Council has further confirmed in correspondence that the delivery of further on-site SANG in addition to a contribution and the green infrastructure requirements identified in the Topic Paper is not expected. Officers have noted a 2.7km dog walking route should be incorporated into the green space requirements.

Whilst the RAMS SPD mitigates against residential disturbance, further surveys will be required to determine whether the development either alone or in combination has an adverse impact on the feeding and foraging habitat for SPA species to determine whether on site habitat maintenance or creation will be required.

A programme of wintering bird surveys over the period December 2021 to March 2022. The Survey Area was used by a diverse range of non-breeding bird species (54 in total) comprising 11 species of waterbird (including golden plover and lapwing), 7 species of raptor and skylark. No corn buntings were recorded. The inclusion of nocturnal surveys in the programme identified that the diversity and the counts of wildfowl and waders are always greater on the nocturnal surveys. Golden plovers were only recorded on the nocturnal surveys and the peak count of lapwing was recorded on the nocturnal surveys. Numbers of golden plover and lapwing in excess of 1% of the recent Colne Estuary population only occurred on a large arable field at the south-west end of the Survey Area, partially outside the Site boundary. Based on the bird distribution information gathered by the programme of surveys undertaken to date, there is no evidence that the land within the Site is functionally linked to the nearby SPAs and Ramsar Sites.

Hartley Wood, mapped as Ancient Woodland on Natural England's Multi-Agency Geographical Information for the Countryside (MAGIC) web map, is located approximately 100m to the west of the allocation area. Long Grove and T Grove, located within the site, are mapped as Deciduous Woodland Habitat of Principal Importance (HPI) on MAGIC. Consideration of the classification of the woodland will need to be considered. It is anticipated that additional surveys and assessments will be required to establish whether Long Grove Wood should be classified as Ancient Woodland, and therefore irreplaceable habitat. The assessment will also need to establish what impact this may have on the masterplan.

Many of the hedgerows within the site contain suitable habitat for dormice especially to the north of the site where there is an extensive hedgerow network connected within the landscape by scrub and woodland. Most hedgerows are bordered by tussocky grass field margins, which provide supplementary nesting and feeding habitat for some species. A 'Hedgerow Regulations assessment' will need to be carried out to determine the importance as a measure of hedgerow value.

There is a high probability of dormice, reptiles, breeding birds and hedgehogs on the site. There is confirmation of brown hares, badgers, common toads, and hedgehogs on site.

Whilst a minor net gain to biodiversity was considered possible using an Illustrative Green Infrastructure Plan, it was concluded that a 10% Biodiversity Net Gain was only possible through retaining larger areas of semi-natural habitats or enhancing larger areas of habitat on or off-site. The site allocation requires the site to deliver at least 10% biodiversity net gain.

There are seven Tree Preservation Orders across the allocation area. These are mostly located along the perimeter of the area, particularly around the southern portion of the site.

HE and GH have recently instructed ecology surveys for the site to fit in with the seasonal requirements. These will be complete around the time of instruction and the appointed consultant team will have full reliance over these.

### **Landscaping**

TDC commissioned Place Services in September 2020 to undertake a landscape sensitivity and character assessment of the Hartley Gardens, which was published in December 2020. The study was undertaken to provide evidence in support of SAMU2 in terms of how the development layout of the site should respond to landscape character and sensitivity and that landscape constraints can effectively be overcome to allow well designed development.

The landscape is predominately flat arable landscape with some urban fringe elements to the south and areas of woodland to the north with an extensive hedgerow network. The Landscape Character and Sensitivity Assessment identifies the site as falling within the Clacton and Sokens Clay Plateau Landscape Character Area. This is comprised of undulating agricultural land underlain by clay, which gives rise to slowly permeable seasonally waterlogged clayey soils and standing water.

The Tendring LCA states that the overall character is weak due to the loss of elms, hedgerow loss and agricultural intensification and built development on the fringes. Furthermore, the LCA references the area as being one of the most densely developed rural landscapes in Tendring and in need of a strategy to strengthen and enhance the character of the landscape, including:

- increasing the extent of native deciduous woodland,
- conserving hedgerows as important wildlife and landscape features,
- restoring grassland habitats lost through agricultural classification and
- maintaining the historic leafy lanes with their ancient oaks and unimproved roadside verges

The below image provides further detail of the relevant landscape features present within the allocation area and beyond:

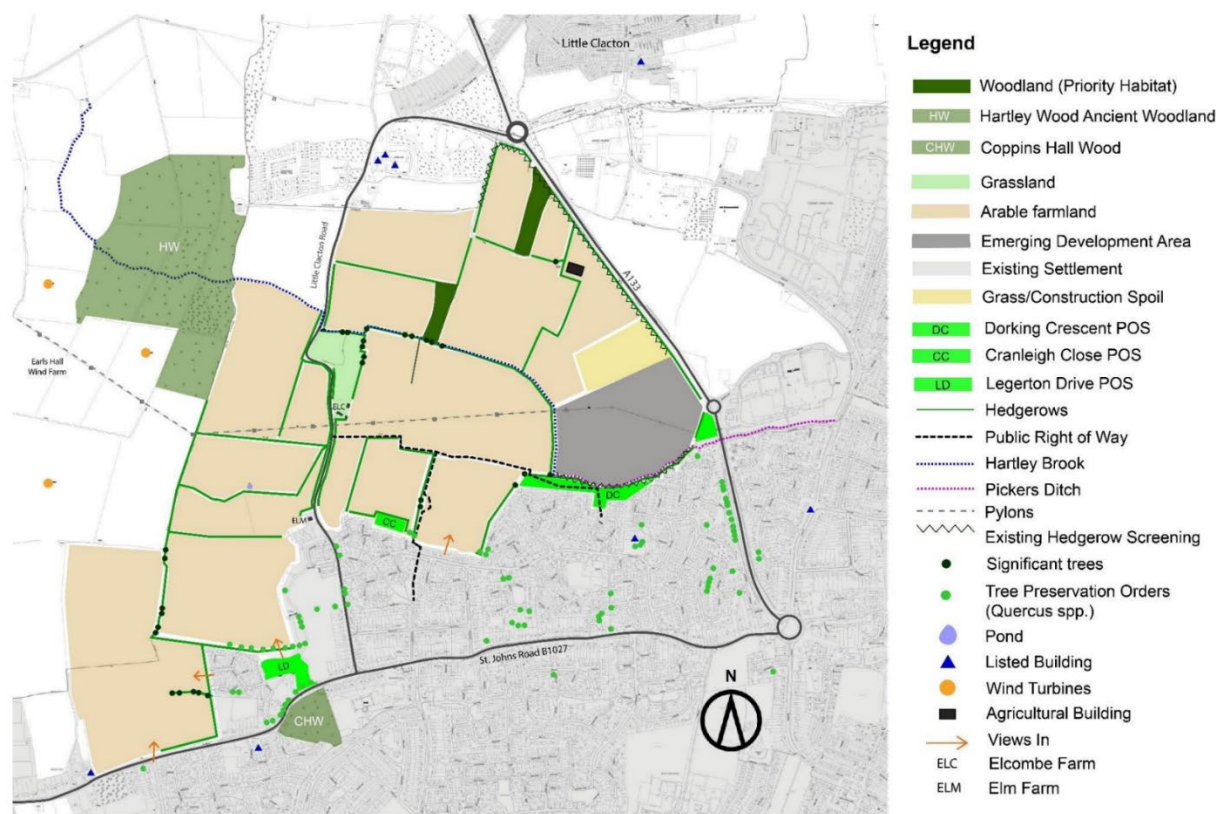
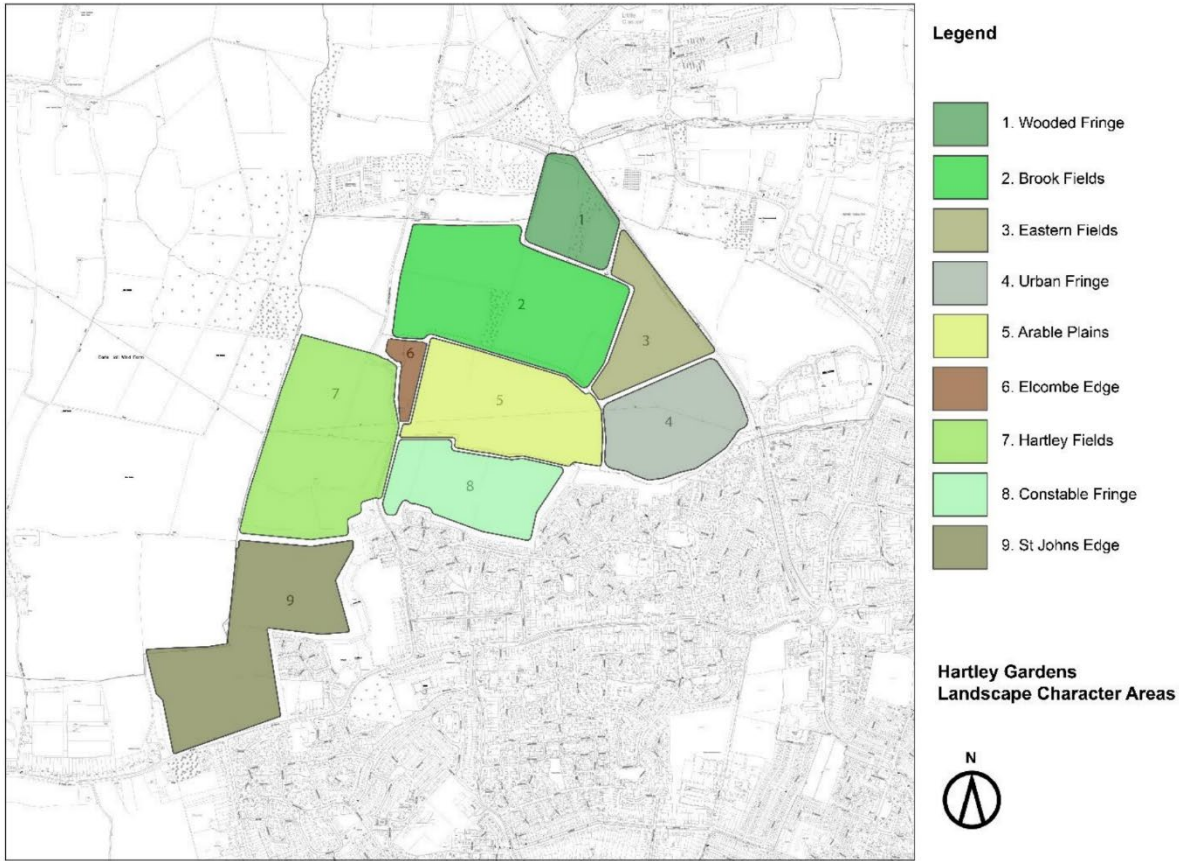


Figure 3: Hartley Gardens Landscape Structure

The allocation area was divided into nine character-areas as part of the appraisal undertaken in 2020, which were then assessed in terms of landscape sensitivity and visual sensitivity. These sub-divisions are shown in the following image:



Consideration will need to be given to the outcome of the appraisal and the recommendations contained therein. Further consideration will need to be given to the other relevant character assessment for this area, including Essex Landscape Character Appraisal (2003) and Tendring District Council Landscape Character Area (2001).

**Flood Risk**

The EA's Flood Map for Planning identifies that the site is Flood Zone 1. There is a watercourse that intersects the site.



Given the size of the site and the requirements of Paragraph 167 (footnote 55) of the NPPF a flood risk assessment will be required.



It is noted that a watercourse, Picker's Ditch, flows west to east across the site between fields and with hedgerows adjacent, forming a strong corridor. At the eastern end of the site, Picker's Ditch becomes a more natural green corridor with footpath connections towards the east. Surface water paths exist running west to east across the site, draining into Picker's Ditch, with a very slight rise in between the two main routes (Picker's Ditch and that running along the PRow corridor). No fluvial flood risk zones are present on site, but a significant area of surface water flooding risk surrounds Picker's Ditch. At the far west of the site, water drains towards the west.

### **Noise**

The dominant noise on the site is likely to be from vehicular movements on the surrounding road network, namely the A133 to the east of the site. Strategic noise maps produced by Defra show that noise levels are around 60 dB LAeq,16hrs during the day and around 50 dB LAeq,8hrs during the night at up to 100m from the A133. Consideration of the location of noise sensitive receptors will therefore be required.

### **Services/Utilities Identified**

In terms of electricity, 33kV overhead lines cross the centre of the site from west to east, with four associated pylons (metal) located within the site boundary. A low voltage overhead line enters from the southern boundary of the site and runs north to supply Elcombe Farm. These should be undergrounded as they have been on the adjacent Brook Park West development to support a better designed development layout.

For other utilities, a high-pressure gas main crosses the southwest corner of the site. A potable water main crosses the site in a similar alignment to the Little Clacton Road. Overhead telecommunications lines run along Little Clacton Road from the south of the site north to supply Elcombe Farm.

Nearby wind turbines do not present a constraint to development, given their distance, however it may be prudent to consider orientation of streets and public open space to avoid direct views.

The provider of Wastewater Services is Anglian Water Services. The Water Recycling Centre at West Clacton, which would serve the Hartley Gardens site needs significant upgrading to treatment capacity. Anglian Water is responsible for funding any required investment to ensure that capacity is made available at water recycling centres in time to serve new development. Anglian Water have prepared a Water Recycling Long Term Plan (2045), which outlines planned investment at both existing water recycling centres and the sewerage network to accommodate development to 2045.

### **Topography**

The land within the site falls towards the south from a high point of approximately 20 m above Ordnance Datum (m AOD) on the site's northern boundary to low points of approximately 10 m AOD along the site's southern boundary.

This approximately 10 m drop in ground level elevation occurs over a distance of (at shortest) approximately 700m, giving an approximate steepest gradient across the agricultural land of 0.014.

Higher gradient slopes may be locally present in the immediate vicinity of the stream that flows through the site.

### **Constraints Plan**

An additional constraints plan is provided at Appendix 2.

## 6. Allocation Area Outputs

The site allocation seeks the delivery of the following on site:

- a. approximately 1,700 new homes of mixed sizes and types to meet evidenced local housing need within the Council's most up to date Strategic Housing Market Assessment and to include 30% affordable housing;
- b. up to 7 hectares of land for employment;
- c. 2.1 hectares of land for a new two-form entry primary school with co-located 56 place early years and childcare facility, 1.3 hectares of land for a second 56 place stand-alone early years and childcare nursery and/or financial contributions towards primary school and secondary school provision as required by the Local Education Authority based on evidenced need;
- d. New facilities and/or financial contributions to support new health provision based on evidenced need;
- e. Green infrastructure which should provide a multi-functional and connected network, including amenity green space, parks, allotments and natural and semi natural green space (meeting the standards set out in Policy HP5) and providing for attractive green walking and cycling routes;
- f. To deliver at least 10% biodiversity net gain;
- g. A sustainable movement network, including principal points of highway access, a hierarchy of streets, facilitating public transport and prioritising the connection of walking and cycling routes within the site and beyond; and
- h. The provision of sufficient utility infrastructure working with the relevant infrastructure providers to ensure that such provision is achieved in a timely manner.

The policy seeks a comprehensive approach to delivery and requires a clear delivery plan to ensure the right infrastructure is funded and delivered at the right place and at the right time.

The SPD will need to further establish an appropriate land use strategy, and this will then inform the outline application. The Council's Topic Paper provides an indicative land use budget. A copy of which can be found here: [TP6 Hartley Gardens Topic Paper - December 2020.pdf \(tendingdc.gov.uk\)](#)

In respect to the residential portion of the site, the total quantum of homes within each portion of the site is yet to be established and this should be driven by a design-led approach developed through the work to be undertaken on the SPD/Masterplan to inform the application. However, it is anticipated that the Homes England portion of the site could deliver between 523-600 units and Greenwich Hospital's site could deliver around 725-800 units. The type of units provided will need to be reflective of the need for homes in the area and consideration should be given for the variety of needs within the population.

## 7. Purpose and Scope of the Appointment

A professional services multi-disciplinary team is required to take forward the key areas of work, to facilitate successful delivery of the site. The multi-disciplinary team (MDT) will provide the project management, planning, technical, design, development management, engagement/ communication, and delivery skills necessary to deliver the following key objectives:

- a. To maximise the value and housing potential of the site, and a scheme consistent with National Planning Policy, adopted local planning policy and good urban design principles.
- b. To unlock delivery of the site.

- c. To prepare a high quality, sustainable and commercially successful / viable residential led (but not limited to) framework masterplan for the Hartley Gardens allocation with details of phasing and delivery.
- d. To seek to maximise receipts for GH and HE to deliver homes appropriate to the local market and in line with the detailed project brief to be agreed
- e. To develop a Design Code to aid the successful delivery of the scheme
- f. Provide options and a preferred option for access / construction access and a responding masterplan.
- g. Support and input into the Hartley Gardens Supplementary Planning Document in accordance with the Local Plan Policy/Guidance and which meets Building for Healthy Life' (BfHL) objectives, for the Hartley Gardens allocation area and is adopted by the LPA.
- h. Prepare and submit an Outline Planning Application and supporting documents/reports to secure an Outline Planning Permission with detailed approval for means of access, spine road and the necessary S.278/S.38 and S.106 agreements for the site (and for the purposes of this document, 'Outline Planning Application' shall be construed accordingly).
- i. Providing viability advice to the landowners, at identified viability milestones and where necessary as part of the planning application
- j. Support the site disposal by advising on and establishing the marketing, delivery and disposal strategy for both Homes England and GH.

One consultancy may not have all the expertise needed to fulfil this brief and Homes England encourages consultants to collaborate to ensure the highest level of advice in each area. Sub-contractor appointments outside of the framework panel membership will need to be approved by Homes England.

### Design and Capacity

Design quality is central to all Homes England developments and as a result, all schemes must demonstrate compliance with Building for Healthy Life principles and Building for Healthy Life assessments to support the scheme will be required. Masterplans must embody high quality placemaking and sustainability principles to maximise both the wider allocation area and the site's attractiveness and deliverability to the market. The masterplan design will be informed by Building for (Healthy) Life 12 assessments, local design guidance and emerging work on the Manual for Streets (3) (if required by TDC), the National Design Guide and the National Model Design Code. It will facilitate the delivery of a development which encourages active and healthy lifestyles and best practice urban design principles.

The land acquired by Homes England is expected to deliver a minimum of 523 homes. The quantum of homes has been informed by initial master-planning work undertaken to inform the acquisition of the site. Homes England consider that the site can accommodate approximately 523 homes whilst adhering to design policies and achieving Building for Healthy Lives 12.



Attention also needs to be paid to the Master-planning Principles established by SAMU2; which further highlights the need to accord with the National Design Guide and the Essex Design Guide.

Further consideration should be given to the scope for other good practice initiatives and potential accreditations, for example Building with Nature.

### **Stakeholder Engagement**

Inclusive stakeholder and community engagement will be important throughout the entire process. Key stakeholder mapping, the types of events, meetings, responsibilities etc. will need to be further developed as the project progresses but engagement must be proactive and extensive to appropriately inform the development. There will need to be a project webportal and wide engagement with the local community, stakeholders. Officers and statutory consultees. Inclusive engagement must be documented to inform the Statement of Community Involvement that will accompany the relevant submissions to the Council.

### **Stewardship**

It is the intention for development proposals at Hartley Gardens to be supported by robust, cost effective and transparent maintenance and stewardship arrangements including appropriate financing arrangements and management responsibilities in perpetuity. Further details are expected to be set out in the Hartley Gardens SPD. In developing the Framework Masterplan and outline planning application for the site, consideration should be given to suitable options which demonstrate appropriate governance arrangements and flexibility to adapt to changing circumstances throughout the life of the development phase and beyond.

The development is likely to have a large area of public open space, possible SANG and BNG provision which will need a consistent future management arrangement across the strategic allocation. It is anticipated that HE and GH will agree a consistent approach across the development as part of the development of the SPD which could include arrangement with a land or wildlife trust.

### **Disposal Strategies**

The absence of co-ordination between landowners and the need for early upfront infrastructure has made the HE and GH site unattractive to the market, with no developers or master developers willing to take on the risk profile of the sites or to take on the level of peak debt required to deliver the sites in entirety. Soft market testing has indicated a willingness to take on serviced parcels with the benefit of planning consent, which could also broaden the general interest in Clacton to a wider range of developers.

HE and GH are working together to deliver the masterplan for the Hartley Gardens allocation and outline planning permission for the site. Both parties intend to dispose of their respective parts of the site to a developer/builder(s) once outline planning and other necessary consents have been approved. The appointed consultants will need to review and agree with Homes England and GH the appropriate phasing and disposal strategy for the site that meets the parties' objectives.

#### **a. Homes England**

Homes England's disposal strategy is to gain outline planning permission for the site, and then dispose of the HE parcel using the Delivery Partner Dynamic Purchasing System (DPS). It is anticipated the HE parcel will be disposed of as a series of 4 phases with a minimum total of 523 homes. This will include the opportunity to facilitate a sale to an SME of 50-70 homes.

However, advice from the appointed consultant team on the best way of bringing this site to the market is required as part of this commission. It is currently envisaged that Homes England will appoint and work with the selected partner(s) responsible for satisfying relevant planning conditions/obligations in S.106 and obtaining Reserved Matters approvals for their development parcel.

## **b. Greenwich Hospital**

GH disposal strategy is to gain outline planning permission for the site which provides the ability to bring forward the GH land for disposal separately either in phases or as a whole to the market. That disposal strategy will depend on market conditions at the time, but the phasing, infrastructure delivery and s106 triggers that will all form part of the planning permission need to provide for flexibility to provide the most viable solution.

Advice from the appointed consultant team on the best way of bringing the site to the market that meets GH objectives is required as part of this commission.

The MDT will be required to advise GH on the options for the stage after outline planning permission. These may include amongst other options:

1. Selling the GH site to one house builder or master developer.
2. A further CA with HE whereby HE provides infrastructure to create turnkey plots for house builders with the costs recovered via a s106 framework.
3. A scheme where GH provides infrastructure on their site to create the turnkey plots.
4. A hybrid of the options above.

For all options GH will need advice on anticipated proceeds, costs, risks, timings and the level of future engagement needed by GH to action the respective options.

Once the preferred options for HE and GH are established and key risks and constraints are known, the appointed multidisciplinary services team will be required to prepare separate Disposal Strategies to guide the project into the early stages of delivery. This Disposal Strategies will need to be market facing to make the site attractive to bidders whilst protecting HE and GH's commercial position in terms of generating a capital receipt for the site(s).

## **8. Key Deliverables**

A professional services team is required to take forward key areas of work as set out in the below scope of services:

### **A. Project Management**

1. Lead consultant shall be responsible for the management and co-ordination of the multidisciplinary team of consultants to manage inputs and deliverables across the project including sub-consultants during the preparation of the framework masterplan, planning application, all associated engagement and during consideration of the planning application once submitted to the Council up to a decision.
2. Project Management service to include leading and chairing team meetings with Homes England and Greenwich Hospital representatives every two weeks to provide details on the project, discuss issues and decisions that need to be reached. Preparation and distribution of agendas, minutes, programme, risk register, issues and action logs at all stages of the project and reported back regularly at team meetings.
3. Project lead to attend project management meetings as required. Project Management to also include project /technical discipline leads to attend meetings with the Project Board as required.
4. To prepare, monitor and update a Project Execution Plan (PEP) setting out the projects and programme objectives, framework, governance and management practices
5. To produce a master project programme with a a drop line against progress.
6. To produce a programme for project stages such as: 1. Project Brief. 2. Fixed concept. 3. Preparation of a planning submission. 4. Submission of a planning application or SPD plan.
7. To manage the budget v actual.

8. To recommend invoices for approval in line with the agreed budget and scope of services.
9. Establish electronic library, file management and file sharing system for all project information and drawings an appendix and filing protocol.

## **B. Masterplanning and Design**

1. Develop and agree a Vision and a set of Development Principles through engagement with the community and key stakeholders for the project and use these to shape the framework masterplan, SPD and outline planning application. This should build on the evidence base and existing information prepared to support the preparation of the Local Plan.
2. Work in collaboration with HE and GH to support (TDC in the preparation of the Hartley Gardens Supplementary Planning Document (SPD)
3. Work with HE, GH and the wider project team leads along with all relevant stakeholders and statutory consultees to lead the development of a framework masterplan that is market facing and which is, consistent with local and national planning policy and good design principles meeting Building for a Healthy Life (BfHL) objectives, maximises a sustainable and viable delivery of new homes to meet identified need and associated community uses and infrastructure on the site.
4. Lead communication of the overall masterplan vision for the project. Show regard for local character, demonstrate innovation and delivery in the design proposals. This will include a programme of design workshops, external design review panels and interactive events to reach a diverse audience.
5. Co-ordinate with technical team leads to consider options for phased delivery of strategic infrastructure including access, green space, community infrastructure, drainage etc.
6. Provide a Phasing Plan and strategy to ensure the comprehensive and co-ordinated development of the Hartley Garden allocation which will allow the site to come forward as the first phase whilst ensuring the right infrastructure is funded and delivered at the right place and time without prejudice to the wider allocation.
7. Prepare a Design Code (if required) for the site which meets Building for Healthy Life' (BfHL) objectives, (if agreed) for the HE site and secure approval from the LPA.
8. Comply with duties of Principal Designer in relation to the Construction, Design and management services.
9. HE and GH will require up to 3 options that should be tested for deliverability, viability, how they respond to engagement with the council and the community. This will progress to the selection of a preferred option that will inform the planning application.

## **C. Planning and Technical Services**

1. Review all documentation/ due diligence undertaken to date and clarify understanding/ confirm strategy is robust.
2. Set, maintain and co-ordinate the overall Planning and Sustainability Strategy for the site.
3. Co-ordinate the engagement, masterplanning, landscaping, technical, economics and costs and project management leads to deliver the project.
4. Work with HE and GH, and all relevant stakeholders and statutory consultees to lead the preparation of an outline planning application for approximately 1,200 dwellings. The application should be market facing which is consistent with local and national planning policy and good design principles which maximises the sustainable and viable delivery of new homes to be an identified need.
5. Work with HE, GH and TDC to lead, review, co-ordinate and input into preparation of the SPD including preparation of representations to formal consultation stages as required.
6. Review all documentation/ due diligence undertaken to date and clarify understanding/ confirm strategy is robust. Prepare and submit a request for an Environmental Impact Assessment (EIA) scoping opinion and an Environmental Statement in accordance with the scoping opinion. This will include gathering of baseline data from all available sources to identify the need for further surveys and studies.

7. Work with HE and GH to lead and support discussions with relevant third parties to progress the preparation and agreement of a framework masterplan, phasing and access strategy.
8. Work with the Local Planning Authority to confirm a Planning Performance Agreement if required (it is expected this will be largely complete by appointment of multidisciplinary team).
9. Work with the Local Planning Authority and relevant stakeholders, through pre-application discussions to determine the scope of the planning application
10. To undertake site investigations, surveys, assessments as required to inform the design and deliver the project objectives.
11. Preparation of all technical reports including for example, an EIA, Transport Assessments, Travel Plan, Flood Risk Assessment, Drainage Strategy, Noise, Air Quality, Ground Investigation, Heritage and Archaeology, Landscape and Visual Impact, Green Infrastructure, Ecological Assessment, BNG, Arboricultural Survey, Design and Access Statement, Planning Statement etc. that would be necessary for this type of application as set out in local and national planning policy and guidance and the Council's local planning application validation list.
12. Work with HE, GH and the Local Planning Authority to lead the preparation, co-ordination and submission of a valid planning application.
13. Work with HE, GH and the Local Planning Authority during consideration of the planning application (following submission and validation) to lead and deal with matters arising and to reach a decision including attendance and presentation at Planning Committee
14. Work with HE, GH, and the Local Planning Authority to lead and co-ordinate the preparation of the S106 Agreement to support phased delivery of the allocation and proportionate contributions to strategic infrastructure requirements.
15. Secure outline planning permission for a housing-led development.
16. Provide valuation-based guidance on how GH and HE should equalise their respective interests in so far as equalisation is not provided for within the s106 framework.

#### **D. Community and Stakeholder Engagement**

1. Prepare, agree, and implement an Engagement/Communication Strategy to achieve buy-in from the community and stakeholders. The community engagement strategy will need to include relevant Parish Councils, Ward Members, Councillors, local residents and local amenity groups along with wider landowners within the Hartley Gardens allocation and any other relevant stakeholder.
2. The Engagement Strategy should include approach to mapping of key stakeholders, types of events, meetings, responsibilities etc. This will be further developed and refined by the Homes England / GH Team with the successful bidder.
3. Carry out necessary Consultation ahead of submission and produce a statement of community consultation to support the application
4. Supplementary Planning Document/Masterplan and Outline Planning Application consultation, for instance:
  - a. Create action plans to coordinate liaison with the local community, stakeholders, politicians and consultees;
  - b. Set out principles for accessible, inclusive communication, both for the internal team and external engagement. Review effectiveness to ensure a diverse audience is reached;
  - c. Manage all digital and media communications and brand considerations. This will include setting up and maintaining a Project website with a project "brand" that will reflect the vision;
  - d. Media monitoring and advice.
  - e. Coordinate targeted local engagement and wider engagement work to develop the SPD/masterplan vision and at application stage, ensuring that residents are kept updated at the relevant stages (e.g., via the webportal, hard-copy newsletters, online Q&A sessions as examples);

- f. Ensure a distinctive overall brand identify for the development with flexibility to evolves as the scheme progresses; as well as,
  - g. Prepare and present project summary briefing packs for interested parties and for all new consultants. This will outline the vision, key elements of the project and ensure that engagement and communication work undertaken previously is explained.
5. To produce a Statement of Community Involvement to be made available to the Council as required and to be submitted as part of the Outline Planning Permission.

#### **E. Market Demand, Market Viability & Disposals Strategy**

1. Undertake an Assessment of Market Demand including looking at housing mix, specification of non-residential uses (e.g. employment, education, local centre, healthcare). The employment uses should be informed by an Employment Needs Assessment and an investigation of the scope provide a more targeted approach to employment hubs across the allocation. Disposal options, phasing etc including soft market testing with developers to inform first draft layout plans, remediation strategy, planning discussions with findings / recommendations being presented within a high-level market report and appraisal that includes a phasing strategy.
2. Undertake viability testing on up to three masterplan options that are to be produced to achieve a preferred optimal option.
3. Provide HE and GH with full Viability Reports at key review points for their respective sites including:
  - a. The date upon the Parties have prepared and approved the form of the Master Plan;
  - b. The date of approval of the Master Plan by the Local Planning Authority;
  - c. The date upon which Homes England shall prepare a draft Planning Application in accordance with this Agreement
  - d. A revised appraisal of the site based on the secured outline planning consent.
4. Provision of individual Disposal Strategies for HE and GH based on the preferred masterplan option for the site, a market review and soft market testing to include:
  - a. viability and pace of delivery
  - b. advice on ideal plot sizes including tenure mix
  - c. phasing and delivery of infrastructure
  - d. ability to dispose of multiple phases without negatively affecting either pace or receipts
  - e. fully warranted Planning Application Information Pack including GI information pack to assist bidders
  - f. options to accelerate delivery in line with HE/GH policy objectives
  - g. S106 advice including the effectiveness of any deed of recovery
10. To liaise with GH and HE to collaboratively prepare and agree a detailed project brief.
11. To work to the detailed project brief and seek change control for any variation the detailed project brief.
12. To manage change control and request permission to any variation affecting forecast project costs, returns and programme. Change control process to be agreed.

#### **F. Infrastructure and Stewardship**

1. Advise on next steps strategy to facilitate early infrastructure delivery (if/where required), phasing strategy, stewardship/management arrangements along with opportunities to accelerate housing delivery. E.g., discharging conditions/ early Reserved Matters applications for infrastructure works etc.
2. Securing the relevant Section 278/38 consents (if/where required) for infrastructure delivery works to commence and prepare an infrastructure delivery strategy.

#### **G. Other Deliverables**

1. Outline and provide a price for any other deliverables you feel are necessary to deliver this commission.
2. Reporting of finances and invoicing as required



## 9. Extent of Appointment

The MDT appointment will be staged with the initial appointment covering delivery of the SPD and masterplan for the wider site area (up to 1,700 homes). Appointment for delivery of the further stages including the outline planning application will be subject to confirmation as the project progresses. This is to ensure project continuity in the unlikely event that GH elects to withdraw their involvement from the Collaboration Agreement (see section 3 above).

Bidders will be required to price for the following stages and options in their response:

**A.** Delivery of SPD and Masterplan (including relevant PM and DM services to support these stages)

Plus:

**B1.** Comprehensive Outline Planning Application and secure Outline Planning Permission and s106 for up to 1,250 homes on HE and GH owned land- reporting to HE and GH as joint clients

or

**B2.** Comprehensive Outline Planning Application and secure Outline Planning Permission and s106 for up to 1,250 homes - reporting to HE as sole client

or

**B3.** Outline Planning Application, secure Outline Planning Permission and s106 for up to 570 homes reporting to HE as sole client

Bidders should provide alternative pricing schedules for each of the four scenarios on the pricing schedules (see Part 2 Paragraph 3 below). For the sake of clarity, option A+B1 will be scored when assessing tenders. But we will review other responses to ensure that there is consistency between options as far as possible.

Further options may arise as the project progresses. The number of homes and other outputs could increase/decrease as the masterplan is developed and assessed. Bidders should demonstrate a mechanism that can take into account the impact of changes of outputs on pricing and fees.

HE and GH will work closely with the appointed MDT as the project progresses to confirm scope and any changes as early as possible but reserve the right to amend the appointment as per above, as the Planning Strategy evolves and/or in the event the Collaboration Agreement is not finalised or is elected to be terminated at any time.

## 10. Management

The commission will be managed day-to-day by Homes England's Planning and Enabling Team with responsibility for reporting to the Project Board, comprising senior representatives from HE and GH, for key decision taking (where relevant). It is anticipated HE and GH (where relevant) will be jointly represented at Project Team meetings. The consultant team will need to work with various members of the Homes England's Planning and Enabling, Consultation and Community Engagement, Technical, MDD, Disposals and other HE and GH teams as required.

It is expected that a Project Execution Plan (PEP) alongside the detailed development brief will be developed at inception which encompasses the consultant teams' approach and commitment to working with both HE and GH as per the Collaboration Agreement. This will include provision for regular reporting via the Project Board at agreed review points throughout the commission.

The PEP must recognise that Homes England takes health, safety and inclusion seriously and expects Suppliers to do the same. All Suppliers must adhere to the Health and Safety obligations in the Framework Contract. This includes the following Homes England policies, where applicable:

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

The Detailed Development Brief will be informed by market expectations and the financial appraisal. It should outline:

- Housing mix by tenures and types
- Optimum house type areas and garden plot size
- Plot size for development sales i.e. 100 to 200 unit
- Approach to affordable housing house types and mix.

## **Meeting Requirements:**

### **A. Inception meeting**

It is anticipated that the inception meeting will be held in the week commencing 10<sup>th</sup> October 2022 and should be attended by all key members of the appointed consultant team. Key milestones and delivery targets will be agreed at the inception stage with the appointment of the consultant and staged fee approvals made on the satisfactory completion of these milestones.

### **B. Project Meetings**

It is anticipated that the day-to-day project management will be led by the lead consultant with two weekly project team meetings (in person or virtually). Lead consultant to co-ordinate team attendance, chair the meeting and provide agendas and meeting notes.

### **C. Review meetings**

Review dates/break clauses will be incorporated into the appointment to ensure project requirements and client expectations are met. If required, these review points may be amended by Homes England.

At each review point the appointed consultant will be required to demonstrate how they have delivered against project requirements in line with forecast spend and the milestones and delivery targets that have been agreed with the successful consultant during inception.

### **D. Poor Performance Meeting**

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

## 11. Payment

A Resource and Pricing Schedule will be required, and it is anticipated that fees will be paid on satisfactory completion of specific milestones/tasks/packs of work. The following gives an example of how this is anticipated to work - bidders are expected to break down each element into a specific Milestone/Task/Pack of Work including team members and fixed fees:

Milestone/Task/Pack of Work	Duration	Outputs	Team	Date of Completion	Fee and Payment Date
<b>Example:</b> Prepare and submit a request for an Environmental Impact Assessment (EIA) scoping opinion and an Environmental Statement in accordance with the scoping opinion. This will include gathering of baseline data from all available sources to identify the need for further surveys and studies.	XXX Weeks	Report / Event / Meeting	Names	Date XXXXXX	£XXXX Date XXXXXX

This is to ensure that both quality and timescales are maintained at all times.

## 12. Other Requirements and Specific Contractual Terms (insurance, warranties etc.)

Warranties will be required for all reports provided by the selected professional services team in accordance with the Multi-Disciplinary Consultancy Framework documentation. These will be required to be assignable to Homes England, Greenwich Hospital and the preferred development partner(s) and others (to cover other potential purchasers/funders/partners) so that they are able to rely on the information provided.

The liability limitation is as noted in the Multi-Disciplinary Consultancy Framework documentation. There will be no reduction in the liability cap due to the anticipated scale of this commission.

## 13. Termination

Should performance during the period of this appointment prove unsatisfactory following the Poor Performance meeting provisions set out in the Management section above, HE and GH 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 HE and GH reserves the right to terminate the appointment and pay for services completed at that point.

## 14. Conflict of Interest

HE and GH 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.

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.

## 15. Confidentiality

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.

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.

## Part 2 - Instructions for Submitting a Response

### 1. General

- 1.1 The Further Competition deadline is **23.30pm on Sunday 4<sup>th</sup> September 2022** and 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](mailto:ProContractSuppliers@proactis.com)
- 1.2 Suppliers **must** ensure that suitable provision is made to ensure that the submission is made on time. Any tender responses received after the Further Competition deadline shall not be opened or considered unless Homes England, exercising its absolute discretion, considers it reasonable to do so. Homes England, may, however, at its own absolute discretion extend the Further Competition deadline and shall notify all Suppliers of any change via ProContract.
- 1.3 **Please note all communications during the tender period will be via the ProContract website. All Suppliers that have registered their interest for the Procurement will receive a direct email notification from ProContract on any updates via the Suppliers registered email address. No approach of any kind should be made to any other person within, or associated with, HE/GH. 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 Homes England will manage the communications via ProContract and co-ordinate with Greenwich Hospital regarding tender queries and scoring.
- 1.5 The Supplier should 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.
- 1.6 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.
- 1.7 Suppliers should specify in their clarification questions if they wish the clarification to be considered as confidential between themselves and Homes England/GH. Homes England/GH 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/GH 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.
- 1.8 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.

1.9 Tender responses must be written in English.

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

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

## 2. Quality

2.1 A Response Form template has been provided in Part 2 to respond to the Quality questions detailed in Section 20 (Evaluation Criteria). The Response Form must be **completed and returned** as part of the tender response.

2.2 Quality will account for **60%** of the overall score.

2.3 Suppliers must provide information on proposed staff in the Response Form and Resource and Pricing Schedule provided in Part 2. If the Supplier is a consortium or intends to sub-contract the Services, in whole or in part, then it should specify precisely in the Resource and Pricing Schedule which economic operator shall perform the Services (or parts thereof).

## 3. Pricing

3.1 A Resource and Pricing schedule has been provided with this Further Competition ITT which must be completed and returned as part of the tender response. Bidders will be required to provide prices for the four scenarios as outlined in section 9 above.

3.2 Price will account for **40%** of the overall score

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

3.4 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.

## 4. Evaluation

4.1 Tender responses will be evaluated on the basis of the overall most economically advantageous Tender (MEAT) submitted to HE and GH. The evaluation criteria (and relative weightings) that HE and GH 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.

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

4.3 Award decisions will be subject to the standstill period if over the EU Services threshold. Unsuccessful Framework Suppliers will be provided with their scores and feedback to explain the award decision.

4.4 Interviews will be held for clarification purposes only, however, scoring may be revisited to reflect the information provided.

## 5. Documents to be Returned

5.1 Suppliers are expected to provide the following information in response to this Further Competition ITT:

- Completed Response Form
- Completed Resource and Pricing Schedule
- Supporting CV's for staff proposed to undertake this commission (no more than 2 pages each)

## 6. Procurement Timetable

*Please note these dates are indicative and may be subject to change. Please refer to ProContract for updates.*

Stage	Timing
ITT Issued to Selected Bidders	<b>2<sup>th</sup> July 2022</b>
ITT Deadline	<b>4<sup>th</sup> September 2022</b>
Evaluation of Tenders	<b>5<sup>th</sup>-30<sup>th</sup> September 2022</b>
Interviews of Successful Bidders	<b>16<sup>th</sup> September 2022</b>
Notification of Preferred Bidder	<b>30<sup>th</sup> September 2022</b>
10 Day standstill period	<b>1-10<sup>th</sup> October 2022</b>
Inception Briefing	<b>w/c 10<sup>th</sup> October 2022</b>

## 7. Key Delivery Milestones

Bidders will need to provide as part of their submission; a comprehensive programme that identifies tasks, timescales / dates of how they will meet these time critical milestones. The following Key Milestones should be used as the basis for creating a comprehensive programme.

Milestone	Date
Pre-Application Engagement to discuss SPD, Masterplan and Submission Programme	

Masterplan preparation including engagement with public, politicians and stakeholders.	
Strategic Framework Masterplan Design 'freeze'	
Outline Planning Application Submission	
Outline Planning Application – Resolution to Grant	
Outline Planning Permission inc. Signed S106	



## 8. EVALUATION CRITERIA

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

**5 – Excellent** Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

**4 – Good** Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

**3 – Acceptable** Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.

**2 - Minor Reservations** Some minor reservations of the Supplier’s understanding and proposed methodology, with limited evidence to support the response.

**1 – Major Reservations/Non-compliant** Major reservations of the Supplier’s understanding and proposed methodology, with little or no evidence to support the response.

**0 - Unacceptable/Non-compliant** Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.

**PLEASE NOTE:**

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

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

HE/ GH will not cross-reference to other answers when assessing quality responses.

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

Number	Criteria	Demonstrated by	Weighting
1	<b>Method Statement</b> Please provide a Method Statement about how you	<b>Provision of:</b>	30%

	<p>propose to deliver the Key Deliverables and where and why you propose to alter the scope of work (if required), particularly if any gaps are identified. Outline project risks and issues.</p> <p><b>PAGE LIMIT:</b> Maximum 15, A4 pages, 11-point font</p> <p>Appendices of Examples of Accepted – maximum of 2</p>	<ul style="list-style-type: none"> <li>• A Methodology Statement outlining the approach for the required services and how the commissions will be undertaken based on the key deliverables.</li> <li>• Schedule of services to be delivered</li> <li>• Information on other Supplier input that may be required</li> <li>• Identification of other information that may be required</li> <li>• Where relevant identification of areas of innovation, added value and areas of risk and issues.</li> <li>• Where appropriate identify the potential impact of external influences and stakeholders</li> <li>• Other commentary on the brief</li> <li>• Supported by relevant examples, where applicable, demonstrating how they are relevant to the approach proposed (i.e Preparation of Framework Masterplan for allocation and outline planning application as part of early first phase of delivery)</li> </ul>	
2	<p><b>Staff and other Resources</b></p> <p>Full staff details for those proposing to carry out the works including any sub-consultants. To include indicative time allocation, fees and detail of relevant experience.</p> <p><b>PAGE LIMIT:</b> Maximum 5 A4 pages, 11-point font</p>	<p><b>Provision of:</b></p> <ul style="list-style-type: none"> <li>• Who will undertake the commission and why have they been chosen including relevant experience from similar projects?</li> <li>• Identify key members of staff, key accountabilities and allocation to the required services</li> <li>• How much time will they devote to it?</li> <li>• Supported by resourcing information provided in Resource and Pricing Schedule (not included in the page limit)</li> <li>• Supported by CVs for key members of staff (not included in the page limit)</li> </ul>	15%
4	<p><b>Management and Communication</b></p> <p>Organogram setting out how the project will be managed (including sub-consultants) and details of how the project team will communicate with the clients/stakeholders.</p> <p>Payment of Fees Schedule.</p>	<p><b>Provision of:</b></p> <ul style="list-style-type: none"> <li>• Provision of details of how the project team will be managed to co-ordinate multiple workstreams, including the sub-team and how the sub-team contracting arrangements will be managed.</li> <li>• Outline key project tools proposed to be used to effectively manage information, resources and actions within the project team and with external stakeholders.</li> <li>• Provision of details of how the client(s) relationship will be managed including regularity of meetings, management of meetings and client reporting and decision making</li> </ul>	10%

	<b>PAGE LIMIT:</b> Maximum 4 A4 pages, 11-point	<ul style="list-style-type: none"> <li>Provision of communication strategy for the clients.</li> <li>Payment of Fees Schedule based on key deliverables.</li> </ul>	
5	<b>Programme</b> Comprehensive programme which demonstrates your understanding of the project and key milestones which need to be achieved (Gantt Chart must be included). <b>PAGE LIMIT:</b> Maximum 3 A4 pages	<b>Provision of:</b> <ul style="list-style-type: none"> <li>Provision of comprehensive programme which demonstrates your understanding of the project and key milestones which need to be achieved. Gantt Chart must be included.</li> <li>Describe how the team would coordinate different workstreams to track progress, mitigate the risks, inform the phased delivery and identify opportunities to add value.</li> </ul>	5%

Price will account for 40% of the Overall Score. The lowest price will gain the maximum marks with other prices expressed as a proportion of the best score using the maths explained in the worked example below.

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

## 9. Worked Example

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

Bidder	Question	Score out of 5	Weighting	Weighting Multiplier	Weighted Score	Total Weighted Score
Supplier A	1	3	30%	6	18	39
	2	3	15%	3	9	
	3	4	10%	2	8	
	4	4	5%	1	4	

Supplier B	1	5	30%	6	30	56
	2	5	15%	3	15	
	3	4	10%	2	8	
	4	3	5%	1	3	
Supplier C	1	2	30%	6	12	n/a (fail)*
	2	1	15%	3	n/a	
	3	2	10%	2	4	
	4	2	5%	1	2	

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

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

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

### Worked example of Overall Score and Ranking

Bidder	Total Quality Score	Price Score	Total Score	Ranked Position
Supplier A	39	40	79	1
Supplier B	56	20	76	2
Supplier C	n/a	n/a	n/a	n/a

### Part 3

#### 24. RESPONSE FORM

<b>Framework:</b>	Multidisciplinary Framework
<b>Project Title:</b>	Hartley Gardens, Clacton-on-Sea
<b>ProContract Identification Number:</b>	[insert]
<b>Supplier:</b>	[insert]
<b>Date:</b>	[insert]

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

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

## **1. Method Statement**

## **2. Staff and other Resources**

## **3. Management and Communication**

## **4. Programme**

## 25. RESOURCE AND PRICING SCHEDULE

Excel spreadsheet to be embedded by Supplier in response

## Appendix 1: Policy SAMU2

### DEVELOPMENT AT HARTLEY GARDENS, CLACTON

Land north of Bockings Elm and west of A133 shown on the Map SAMU2, is allocated for long-term mixed-use development for the phased and comprehensive delivery of the following:

- a. approximately 1,700 new homes of mixed sizes and types to meet evidenced local housing need within the Council's most up to date Strategic Housing Market Assessment and to include 30% affordable housing as set out in Policy LP5;
- b. up to 7 hectares of land for employment;
- c. 2.1 hectares of land for a new two-form entry primary school with co-located 56 place early years and childcare facility, 1.3 hectares of land for a second 56 place stand-alone early years and childcare nursery and/or financial contributions towards primary school and secondary school provision as required by the Local Education Authority based on evidenced need;
- d. New facilities and/or financial contributions to support new health provision based on evidenced need;
- e. Green infrastructure which should provide a multi-functional and connected network, including amenity green space, parks, allotments and natural and semi natural green space (meeting the standards set out in Policy HP5) and providing for attractive green walking and cycling routes;
- f. To deliver at least 10% biodiversity net gain;
- g. A sustainable movement network, including principal points of highway access, a hierarchy of streets, facilitating public transport and prioritising the connection of walking and cycling routes within the site and beyond; and
- h. The provision of sufficient utility infrastructure working with the relevant infrastructure providers to ensure that such provision is achieved in a timely manner.

The development will follow a comprehensively master-planned approach to be set out in a site-specific Supplementary Planning Document (SPD) or comprehensive masterplan which has been prepared for approval by the Council. The purpose of the SPD or masterplan will be as follows:

- i. provide further detail on the geographical extent and boundary of the allocation, ensuring a defensible and sensitive boundary to the open countryside beyond;
- ii. provide the means to inform, assess and determine planning applications and secure comprehensive, co-ordinated and integrated sustainable development; and
- iii. facilitate and support the co-ordination and timely delivery of the green, social and physical infrastructure necessary to facilitate growth in this location.

The above requirements aim to ensure the comprehensive and co-ordinated development of the site, to ensure the masterplanning principles below are addressed and to provide a clear delivery plan to ensure the right infrastructure is funded and delivered at the right place and at the right time.

In addition, development in advance of the Hartley Gardens SPD or masterplan may be permitted provided that:

- There would be no conflict or prejudice to the delivery of the wider Hartley Gardens development (including its infrastructure requirements) and would not undermine the integrated and co-ordinated approach to the wider development;
- The development demonstrably conforms to the policy requirements and principles of Policy SAMU2 Hartley Gardens;



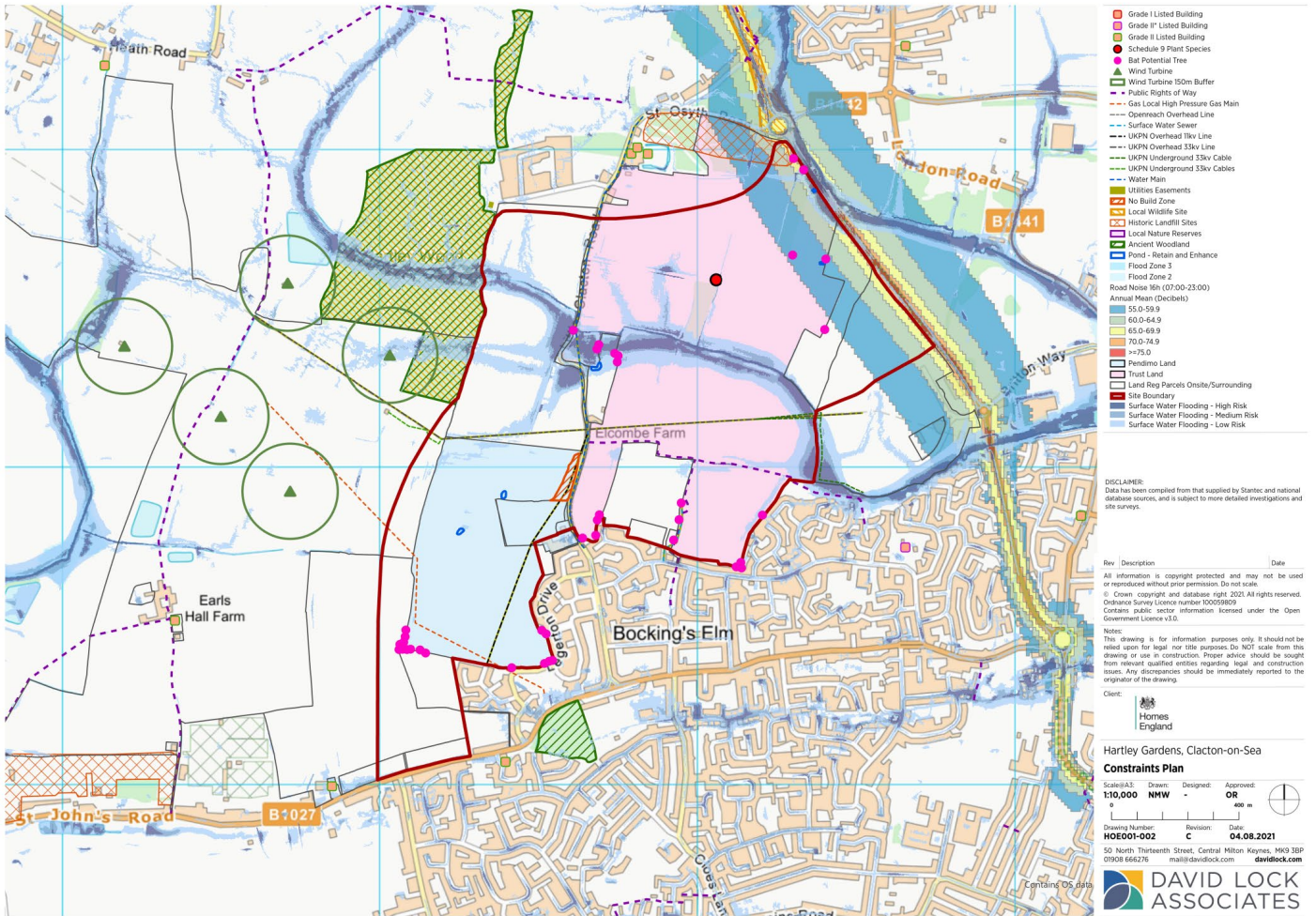
- The proposal can demonstrate that it would not compromise the delivery of a site wide highway infrastructure strategy, or the delivery of sustainable modes of transport within the scheme and that the residual impacts upon the transport network will not be severe.

## Masterplanning Principles

The Hartley Gardens SPD or masterplan will provide further guidance to meet the following principles and all development proposals should accord with these:

- create a series of permeable and legible well-defined streets which prioritise cycle and pedestrian routes which link into the existing built up area and local facilities (e.g. retail and schools);
- identify off site highway works required to support new development, their phasing and funding;
- identify public transport measures to ensure sufficient access to the site by bus, rail, walking and cycling routes within the site with strong and positive linkages to the existing network;
- create a high quality built and natural environment that respects the built and landscape character and context of the local area and which reflects the guidance in the National Design Guide and the Essex Design Guide;
- incorporate in the design of new development measures to minimise the contribution to climate change and to ensure new development is resilient and adaptable to the effects of climate change;
- create a connected multi-functional green infrastructure network which protects and enhances existing site features of landscape and ecological value and any veteran trees, hedgerows and other important landscape features and important habitats;
- ensure no net loss of biodiversity, and to deliver a 10% net gain as well as securing positive benefits to biodiversity through the restoration, enhancement and creation of appropriate semi-natural habitats within and through the site to maintain, restore and create functional ecological networks;
- establish a sustainable drainage system across the site that integrates with the green infrastructure network and utilises where practicable existing watercourses (e.g. Hartley Brook and Pickers Ditch), ponds, ditches and any greenways associated with retained hedgerows and maximised habitat value;
- create a landscape structure that retains and utilises existing landscape features (such as hedgerows, trees, Hartley Brook and Pickers Ditch) and uses new planting and landscaping to sensitively integrate new built development and provide an attractive green setting;
- use structural planting and the location, orientation and design of new buildings to maintain the landscape setting and separate identity of Little Clacton and to carefully screen and sensitively integrate new infrastructure and buildings from the open countryside to the west to minimise any visual impact;
- identify opportunities to preserve and enhance the setting and significance of heritage assets, including at Bovills Hall, Earls Hall and Dutchess Farmhouse and Bluehouse Farm;
- where an archaeological evaluation (trial trenching where necessary) identifies surviving archaeological deposits, an appropriate mitigation strategy for preservation in situ or by excavation should be submitted;
- demonstrate that no internationally designated sites would be adversely affected by the development either alone or in combination with other proposals as per the requirements of Policy PPL4 and future proposals will need to demonstrate no adverse impact on water quality as per the requirements of Policy PPL5; and
- demonstrate how a phased approach to development can deliver the required infrastructure in a coordinated and timely manner and to create an integrated and sustainable community.

# Appendix 2: Constraints Plan



enquiries@homesengland.gov.uk  
0300 1234 500  
gov.uk/homes-england