**ENQUIRIES AND QUOTATION SUBMISSION**

Southend Borough Council invites you to quote for the provision of ‘**Proposal for Rochford and Southend Combined Housing and Economic Land Availability Assessment Update’.**

A specification has been attached, please see Section C. If you are interested in bidding for this work, please provide a quote for the work and a proposal based upon our requirements and the available budget, indicating your relevant experience, including case studies and recommendations where applicable and key milestones.

Suppliers should note that all clarification questions must be made in email. The Council at their discretion reserves the right to circulate any response to all providers. All clarification questions must be clearly marked CLARIFICATION with the question and Provider details clearly set out. Any clarification questions from the Supplier to the Council should be sent to [michellemcmenemy@southend.gov.uk](mailto:michellemcmenemy@southend.gov.uk).

It is recommended that Suppliers click ‘**Watch this notice’** on Contracts Finder to be notified of any clarifications or updates to the documents.

The quotation return date is **12:00hrs on Friday 22nd November 2019.** Quotations should besubmitted by email to [michellemcmenemy@southend.gov.uk](mailto:michellemcmenemy@southend.gov.uk) (you are recommended to request confirmation of receipt). Please use the title **‘Proposal for Rochford and Southend Combined Housing and Economic Land Availability Assessment Update’** when submitting your response.

| **Stage** | **Date(s)/time** |
| --- | --- |
| Issue of Enquiries and Quotation Submission | 8th November 2019 |
| Deadline for Suppliers to submit clarification questions | 13th November 2019 |
| Deadline for the Council to submit responses to clarification questions | 15th November 2019 |
| Deadline for submission of Quotes | 22nd November 2019 |
| Tender Evaluation commencement | 25th November 2019 |
| Notification of result of evaluation | 27th November 2019 |
| Contract award | 28th November 2019 |
| Contract Commencement | 1st December 2019 |

Suppliers are requested to provide the following information in support of their application (further details can be found in the technical questionnaire in Section A- Technical Questionnaire)

* Demonstrable understanding of the brief & subject area
* Track record of delivery of similar services, including examples of how you have carried out such services in the past.
* Details of individuals and team involved
* How added Social Value can be provided
* Costs including all project fees, management fees, resource allocation, other expenses excluding VAT (if applicable). – If costs are subject to the number of participants please identify this within your response.

**Evaluation of Quotations**

All quotations will be subjected to a thorough evaluation. The Council will examine quotations for completeness and may seek clarification where necessary. A quotation determined to be incomplete or not substantially fulfilling the conditions in this document will be rejected.

* Technical (Quality) evaluations will be conducted, based on the information submitted in Section A. in writing, as part of this quotation submission.
* Commercial (Price) evaluations will be conducted, based on the information submitted in Section B, in writing, as part of this quotation submission.

**Award Criteria**

The Council does not bind itself to accept the lowest priced quotation, or any quotation for this service. The Council will have no obligation to Suppliers arising from this quotation unless and until it enters into a formal contract with the successful Provider for the provision of the goods and/or services that are subject to this Quotation document. Any contract awarded will be to the Provider whose proposal is determined to be the most economically advantageous.

30% PRICE ALLOCATION: To be detailed within this written quotation submission, by the Provider. It is the requirement of the Council to maximise the budget available for this project. The Quotation is accepted on a “Fixed Price” basis and the Provider will not be entitled to claim any additional payments or expenses including but not limited to any increase in the price of the service and / or cost of, or incidental to, the employment of labour. The prices included in the Quotation shall be the maximum payable by the Council for the duration of the contract.

Pricing Evaluation (30%) – Using the Prices submitted by Suppliers a percentage will be allocated to the total cost as follows:

* Score = (Lowest Price Quotation / Your Price) \* 30%.
* The Table below gives an example of how the methodology works when applied to contract prices. The prices used here are examples of the pricing methodology and do not reflect any expectation of this contract in relation to any aspect of the pricing.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Bid A | Bid B | Bid C | Bid D |
| Programme Price | £14000 | £15000 | £14500 | £14000 |
| Points Score | 30% | 28% | 28.96% | 30% |

The scores awarded in the example table to Bid A and Bid D is calculated as follows:

* Bid A and Bid D with the lowest contract price in relation to the other bids are awarded the score of 30. The applied methodology gives a calculation as follows: (£14,000 / £14,000) x 30% = 30.00%.
* Bid B with the highest contract price in relation to the other bids is therefore the lowest scoring bid in the pricing section, awarded 28%. The applied methodology arrives at this score through a calculation as follows: (£14,000 / £15,000) x 30% = 28%.

70% QUALITY ALLOCATION: To be detailed within this written quotation submission, by the Provider, in Section A (Technical Questionnaire). Your quote in response to this brief should consider and provide the following:

|  |  |  |
| --- | --- | --- |
|  | SECTION | SECTION WEIGHTING |
|  | Demonstrable understanding of the service & subject area | 35% |
|  | Track record of delivery of similar pieces of work | 15% |
|  | Individuals and team involved | 15% |
|  | Social Value | 5% |

Evaluation of Responses will be carried out on an individual question basis. Grade labels and definitions are as follows:

|  |  |  |
| --- | --- | --- |
| **SCORING MATRIX** | | **SCORE** |
| **Unacceptable/ not answered** | Question not answered – and / or – Response to the question significantly deficient – and / or - raises fundamental concerns regarding the organisation’s ability to successfully deliver the Contract. Answer does not provide satisfactory evidence as to the organisation’s capability to deliver the contract successfully. | 0 |
| **Poor** | A response that is inadequate or only partially addresses the question. Response provides only limited evidence as to the organisation’s capabilities to deliver the contract successfully. Raises a large number of concerns and/or includes a large number of informational deficiencies. Does not raise any fundamental concerns regarding the organisation’s ability. | 1 |
| **Acceptable** | An acceptable response submitted in terms of the level of detail, accuracy and relevance. Answer provides an average level of evidence as to the organisation’s capability. The response raises some concerns and/or includes a significant number of informational deficiencies. Does not raise any fundamental concerns regarding the organisation’s ability. | 2 |
| **Good** | A good response in terms of the level of detail, accuracy and relevance. The information provides good evidence of the ability of the organisation to deliver the Contract successfully; but does raise minor concerns and/or includes deficiencies around some of the information provided in the response. Does not raise any fundamental concerns regarding the organisation’s ability. | 3 |
| **Very Good** | A very good response in terms of the level of detail, accuracy and relevance. The information submitted provides significant evidence of the ability of the organisation to deliver the Contract successfully. However, the response lacks a level of detail needed for full marks. The response raises no fundamental concerns regarding the organisation’s ability. | 4 |
| **Excellent** | An excellent response in terms of the level of detail, accuracy and relevance. The level of information provided is comprehensive and evidences strongly an assurance as to the organisation’s capability to deliver the contract successfully.  The response raises no concerns and has no information deficiencies. | 5 |

**SECTION A - BASIC CONTACT DETAILS & TECHNICAL QUESTIONNAIRE**

|  |  |  |
| --- | --- | --- |
| Contact name for enquiries about  this bid: |  | |
| Address:  Post Code: |  | |
| Telephone Number: |  | |
| Email Address: |  | |
| Company Registration Number (if  this applies): |  | |
| VAT Registration number: (if  this applies): |  | |
| Have you ever been employed by this Council? (if yes please provide details) | | Yes   No |
| Please state if you have a relative(s) who is employed by the Council at a senior level or who is a Councilor? (if yes please provide details) | | Yes   No |

**PROSPECTIVE PROVIDER RESPONSE FORM**

**SECTION B - TECHNICAL QUESTIONNAIRE**

Please note that page limits are on the basis of font Arial 12 and also include charts, diagrams, tables etc. Additional appendices are not permitted other than requested. Please do not include hyperlinks as these will not be evaluated.

|  |
| --- |
| **1. Demonstrable understanding of the brief & subject area**  Explain how you will deliver the brief (see Section C Specification, Clause 4 Project Methodology and Outputs). Set out the knowledge and expertise that you can bring to deliver a fit for purpose piece of work of the highest quality.    (5 pages max. Weighting = 35%) |
|  |
| **2. Track record of delivery of similar services, including examples of how you have carried out such services in the past.**  Please set out evidence of successful work in similar fields and the areas of expertise that you will bring to this contract  (3 pages max. Weighting = 15%) |
|  |
| **3. Individuals and team involved**  Provide an overview of the individual/s you are proposing to complete this work and how their skills and knowledge will help deliver the service.  (2 page max. Weighting = 15%) |
|  |
| **4. Social Value**  Please provide a statement which outlines the social value outcomes you aim to deliver under this contract. Please include evidence of the approaches you will deploy and the way you will demonstrate that the social outcomes have been achieved.  (2 page max. = 5%) |
|  |

**PROSPECTIVE PROVIDER RESPONSE FORM**

**SECTION B – COMMERCIAL QUESTIONNAIRE**

|  |
| --- |
| Please provide a quote for the full cost of delivering the Project Methodology and Outputs (Section c Specification, Clause 4 Project Methodology and Outputs). Please set out costs for each Stage.  Costs including all project fees, management fees, resource allocation, other expenses excluding VAT (if applicable). – If costs are subject to the number of participants please identify this within your response  (Weighting = 30%) |
|  |

**SECTION C – SPECIFICATION**

**Proposal for Rochford and Southend Combined Housing and Economic Land Availability Assessment Update**

1. **Introduction**
   1. Southend Borough Council and Rochford District Council (“the Councils”) are seeking to appoint a suitably qualified consultant to prepare a Housing and Economic Land Availability Assessment Update (“HELAA”), which will form a key part of the evidence base supporting the preparation of their respective local development plans.

1.2 The study area comprises all of Rochford District and Southend Borough.

1.3 The primary purpose of the HELAA will be to provide a NPPF and PPG-compliant assessment of the availability, suitability and achievability of land within the study area for housing and economic development purposes and ensure that the recently prepared respective HELAA’s apply a consistent methodology.

1.4 Tenders are invited from suitably qualified consultants with relevant experience who are able to demonstrate sufficient skills and capacity to fulfill the requirements of this brief.

1.5 In light of the duty to co-operate and the strong relationship between the two authority areas, and being at similar stages in the plan preparation process, the Councils are now exploring opportunities to plan jointly across both authority areas, including to potentially prepare a joint Part 1 Local Plan and in the commissioning of joint evidence. This would allow the authorities to more effectively address more localised strategic issues and respond positively to cross-boundary opportunities and challenges, including around London Southend Airport and significant growth pressures. Should this be progressed, the Councils would expect to prepare and consult on a joint spatial options paper in Q3 2020.

1.6 The HELAA will form a key component of the Councils’ evidence base to inform plan making, underpinning policies for housing and economic development, including supporting the delivery of land to meet identified need for these uses.

1.7 Both Councils have recent HELAAs in place (Southend HELAA dating 2018[[1]](#footnote-1) (2017 base date), and the Rochford HELAA dating 2017[[2]](#footnote-2)), and the purpose of this study would be to review both documents, assessing new sites (approximately 100 sites), and providing a unified approach and methodology, updating both using a 2019 base date (compliant with the NPPF and PPG). The existing HELAAs include a viability assessment, with viability workshops being held during the process.

1.8 The assessment should be proportionate, building, where possible, on existing information sources outlined in the guidance and utilising information provided by the Councils, including on current and future land availability. The final report should be user friendly and concise, with an executive summary provided up front in plain English, providing clear outputs capable of regular review and monitoring. It should also be supported by a robust viability assessment.

1.9 It is expected that the HELAA will be arranged by settlement areas (to be provided by the Council’s) – some of which may cross administrative boundaries. Expected outcomes include individual trajectories for Rochford District Council and Southend Borough Council respectively, and a combined trajectory for both authorities. These should be presented in the final reports. The HELAA will also be supported by an updated viability assessment as appropriate.

1.10 The outcomes of the HELAA will enable the Councils to plan proactively for the future of both authority areas by shaping a spatial strategy which sustainably meets objectively assessed needs for both housing and jobs.

1.11 This project brief outlines the policy background, the Councils’ expectations for the HELAA, and details the requirements for tender submissions.

1. **Local and Policy Context**
   1. Both authorities face significant growth pressures with the Councils’ latest evidence showing there is a need to provide up to 32,000 homes and approximately 13,000 new jobs across both authority areas over the next 20 years. Of these needs, a significant majority (24,000 homes and 11,000 jobs) result from Southend Borough. Whilst the Councils’ individual and joint evidence bases suggest there is a limited supply of land within existing urban areas to accommodate these needs, the Councils’ require an up-to-date and robust HELAA to quantify and qualify the supply of land available in both authority areas to meet these identified needs.
   2. Both authorities have now commenced work on preparing new Local Plans, having both consulted on respective Regulation 18 Issues and Options Documents.
   3. In light of the strong relationship between the two authority areas, and being at similar stages in the plan preparation process, the Councils are now exploring opportunities to plan jointly across both authority areas, including to potentially prepare a joint Part 1 Local Plan and in the commissioning of joint evidence, in order to more effectively address more localised strategic issues and respond positively to cross-boundary opportunities and challenges, including around London Southend Airport and significant growth pressures. Should this be progressed, the Councils would expect to prepare and consult on a joint spatial options paper in Q3 2020 which would be informed by emerging evidence including the HELAA to which this brief relates.
   4. Any joint planning arrangements between the Councils would sit within a broader planning and investment framework being prepared across South Essex. The Councils, through the Association of South Essex Local Auhtorities (ASELA)[[3]](#footnote-3), have also committed to the preparation of a South Essex Joint Strategic Plan (JSP) in partnership with the other South Essex authorities.
   5. The South Essex JSP is expected to sit alongside each authorities’ respective Local Plans, providing an overarching framework for South Essex and considering strategic issues such as the broad spatial distribution of new growth across the sub-region, which is in itself being informed by a high-level ‘Growth Locations Study’ that is currently underway. It is expected that the Councils’ potential Joint Part 1 Local Plan would then, if progressed, provide the more detailed analysis and evidence needed to support the delivery of the South Essex JSP and address more technical matters such as the allocation of land, infrastructure delivery and the Green Belt.
   6. The South Essex JSP is still in its infancy and the first stage of consultation is expected in January 2020. Whilst the HELAA to which this Tender brief relates is intended to mainly provide a local source of evidence to inform plan maing, it is likely that the Study will also provide a useful source of evidence to inform the joint planning work underway across South Essex by informing any wider spatial strategy for new housing and economic growth, particularly concerning land within Rochford District and Southend-on-Sea Borough.

2.7 The HELAA will sit within a broader evidence base which includes Green Belt and Landscape Character and Sensitivity Studies (jointly prepared with Southend-on-Sea Borough Council), and other technical studies, including on the economy, infrastructure and the environment. Together these studies will help to shape and inform an emerging spatial strategy for growth across Rochford District and Southend-on-Sea Borough.

2.8 The HELAA should also have regard/ feed into the work the Council’s are undertaking in regard to settlement capacity, including Southend’s current evidence base production that focuses on capacity in the existing urban area.

1. **Purpose of the Study**

3.1 In support of the work both Councils have undertaken on their new Local Plans to date, both Councils have prepared individual HELAAs within the past 24 months. This project would effectively form a joint update to these existing HELAAs which would be required to :

* Assess additional sites not included or identified in previous HELAAs, including new submissions to the Councils’ respective ‘Call for Sites’ exercises (approximately 100 sites); and
* A light review of the conclusions from these previous HELAAs to ensure consistency and robustness, and compliance with the approach set out in the NPPF and PPG, provided a consistent methodology.
* Provide individual trajectories (policy on and off) for Rochford and for Southend, together with a combined trajectory, with a 2019 base date.
* Be arranged by settlement areas.

1. **Project Methodology and Outputs**

4.1 The detailed requirements of this brief are set out below:

* Tender submissions should set out a detailed methodology and project plan capable of delivering an effective, proportionate and robust assessment of land availability within the administrative boundaries of both Southend Borough and Rochford District.
* The Contractor will be expected to undertake this HELAA in accordance with the guidance and five-stage methodological structure set out in the PPG, including to:
* Undertake a light review of relevant national and local policy and guidance, and of the existing evidence base (including the previous Southend and Rochford HELAAs and updates), and including any future revisions made during the lifetime of the Contract;
* Undertake the HELAA based on a transparent and robust methodology (informed by and in conformity with the NPPF and Planning Practice Guidance), to be clearly set out within the final report (a consistent approach used for both authorities), and to provide detailed commentary in order to present a clear audit trail of all decisions made and conclusions reached.

4.2 Unless otherwise agreed, the Contractor will be expected to carry out the HELAA in strict accordance with the five-stage methodology contained within the Planning Practice Guidance (PPG) on ‘Housing and Economic Land Availability Assessments’. It is not envisaged that any developer workshops will be required given these were undertaken recently as part of the existing HELAA’s.

4.3 A diagram setting out the methodological structure to be followed is provided at Appendix A.

4.4 The Contractor will be expected to identify and agree with the Councils a list of sites to be included in the HELAA, which should comprise as a minimum any new sites submitted through both Councils’ respective ‘Call for Sites’ processes (approx. 100 sites) that have not been assessed as part of the Councils’ previous HELAAs. Tenders should incorporate an optional per-site cost should the Councils require additional sites to be included.

4.5 Both Councils have published HELAAs within the last 24 months and have updated their housing trajectories as part of their respective Authority Monitoring Reports (AMRs). The Contractor will be expected to have regard to these documents in the undertaking of this HELAA update, including resolving any minor methodological differences between the two previous HELAAs when delivering the necessary outputs. As the information within RDC’s previous HELAA was collected over 2 years ago, RDC will be undertaking a high-level factual review of the suitability and availability conclusions to ensure they remain factually accurate. The Contractor will be expected to also have regard to this review and incorporate any updated conclusions into this HELAA update. SBC has updated their HELAA to a 2018 and 2019 base year, which is available.

4.6 The final list of sites and/or broad locations to be included in the HELAA should be agreed by the Contractor and the Councils prior to the commencement of Stage 2.

4.7 In accordance with the PPG, it is expected that the Contractor will carry out both desktop and site-based surveying of sites to inform Stages 1 and 2 of the HELAA. Where it was not possible, or was considered unnecessary, to undertake a site-based survey, this should be first agreed with the Councils and an alternative form of surveying agreed, e.g. use of aerial imagery.

4.8 Where there is sufficient evidence at Stage 1 to conclude that there is very little prospect of development on a site within the plan period, such a site should not be progressed to later Stages of the HELAA. This may occur where there is very little chance of the site becoming available for development in the plan period or because of the presence of an insurmountable constraint. The exact exclusion criteria should be agreed between the Councils and Contractor at an Inception Meeting but may include conflict with international environmental designations, such as Natura 2000 sites, or proximity to active Ministry of Defence sites, such as at Foulness Island.

4.9 As set out in the PPG, the Contractor will be expected to assess the suitability, availability and achievability of each site in accordance with an agreed methodology. As part of this process, the Contractor will be expected to undertake viability appraisals for both the new sites within this HELAA and to undertake a reappraisal of the viability of existing sites from the Councils’ previous HELAAs ina cost effective way. The Contractor should agree the exact assumptions to be used in any viability testing with the Councils drawing upon the eixsiting asessments. These assumptions will need to reflect realistic development assumptions which take account of the differences in the nature of development between Rochford District and Southend-on-Sea Borough, such as through the use of appropriate typologies.

4.10 SBC is preparing an Urban Capacity Study for the adminstration area of Southend. Consideration should be made and discussed with the Councils as to the merits of inlcuding any relevant findings and how these may be taken forward as part of this HELAA update.

4.11 The key outputs of this Contract should be completed no later than end of May 2020 and comprise:

* Interim reports for comment, followed by a final report containing, as a minimum:
  + The scope, purpose, methodology and policy context of the HELAA;
  + A list of sites and broad locations included in the HELAA, including a list of any sites excluded from the later stages of the HELAA and the reasons for their exclusion;
  + A site-by-site assessment of the suitability, availability and achievability of each site or broad location for housing and economic uses, organised by settlement area[[4]](#footnote-4);
  + A review of each Councils’ past windfall delivery rates and a resolution as to whether a windfall allowance should be factored into each Council’s housing trajectory;
  + Consideration of how the emerging Southend Urban Capacity Study should be incoporated into the new HELAA (e.g. either through additional site assessment, inclusion within windfall allowance or other mechanism) if at all;
  + A review and update to the general market viability appraisal to provide commentary on deliverability and viability of sites (including of affordable housing); and
  + Consideration of whether a sufficient number of sites have been identified to meet each Councils’ objectively assessed needs for housing and economic uses. Where an insufficient number have been identified, information around additional steps considered or implemented under Stage 4
* An indicative trajectory for each site considered to be deliverable or developable, including the likely timescales for delivery and build out rates. This should be presented separately for each authority area in or supported by a table[[5]](#footnote-5), provided in a Microsoft Excel spreadsheet unless another format is agreed by the Councils.
* GIS shapefiles in ESRI format showing the outline and location of every site assessed in the HELAA, either as a single layer or in category-specific layers as agreed between the Councils and the Contractor.

**5 Communication**

5.1 Good communication between the Contactor and the Councils officers will be expected throughout the life of the Contract. This should include, but is not limited to, an inception meeting to discuss and agree any issues prior to the commencement of the HELAA, regular weekly or fortnightly email updates on progress, and conference calls and face to face meetings at key stages.

5.2 Both the Councils and the Contractor will be responsible for responding to emails and/or phone calls in a timely manner to avoid any undue delays to the delivery of the Contract.

**6 Tender Value**

We would not expect fee quotes to be greater than £60k. This is being undertaken as part of a competitive bidding process.

1. [Southend Housing Land Availability Assessment 2018](https://localplan.southend.gov.uk/sites/localplan.southend/files/2019-03/Southend%20Housing%20Land%20Availability%20Assessment%202018.pdf)

   [Part 3 Viability Report for Housing Land Availability Assessment 2018.pdf](https://localplan.southend.gov.uk/sites/localplan.southend/files/2019-03/Part%203%20Viability%20Report%20for%20Housing%20Land%20Availability%20Assessment%202018.pdf)

   [Southend Employment Land Availability Assessment 2018](https://localplan.southend.gov.uk/sites/localplan.southend/files/2019-03/Southend%20Employment%20Land%20Availability%20Assessment%202018.pdf) [↑](#footnote-ref-1)
2. [Rochford Strategic Housing and Economic Land Availability Assessment (SHELAA) 2017](https://www.rochford.gov.uk/strategic-housing-and-economic-land-availability-assessment-shelaa-2017) [↑](#footnote-ref-2)
3. Consisting of Basildon Borough Council, Brentwood Borough Council, Castle Point Borough Council, Rochford District Council, Southend-on-Sea Borough Council, Thurrock Council and Essex County Council [↑](#footnote-ref-3)
4. The Councils have separately commissioned a Settlement Role and Hierarchy Study, which will help inform this classification. [↑](#footnote-ref-4)
5. Data tables and GIS should be set out to allow for trajectories to be made for each Settlement in the study area. [↑](#footnote-ref-5)