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| WyreLogoSmall  **Wyre Borough Housing Needs Assessment 2023**  **INVITATION TO QUOTE**  **Deadline for receipt of responses via email**  **no later than noon 3rd November 2023**  September 2023 |

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| **1.** | **Overview** | | |
|  | **1.1** | Wyre Borough Council (the Council) is inviting quotations on the terms set out in the Invitation to Quote (ITQ) for the supply of a Wyre Borough Housing Needs Assessment 2023 in accordance with the requirements at **Appendix 1.** | |
|  | **1.2** | It is anticipated that the contract will **commence 11 December 2023** or earlier if possible. | |
|  | **1.3** | It is essential to comply with the following instructions in the preparation and submission of your quotation and to fully complete and submit all required parts of this quotation documentation. The Council reserves the right to reject a quotation that does not fully comply with these instructions. | |
| **2.** | Contact Details | | |
|  | **2.1** | The contact for the Council for this contract will be:  Madison Yeo, Affordable Housing Delivery Officer, Wyre Council  Tel: 01253 887246 Email: [madison.yeo@wyre.gov.uk](mailto:madison.yeo@wyre.gov.uk)  Fiona Riley, Planning Policy Manager, Wyre Council  Tel: 01253 887235 Email: [fiona.riley@wyre.gov.uk](mailto:fiona.riley@wyre.gov.uk) | |
| **3.** | Submission Requirements | | |
|  | **3.1** | Your quotation must be completed in English and must be submitted electronically **via The Chest** by no later than **noon 3rd November 2023.** Quotations received after this date and time will not be considered. | |
|  | **3.2** | Any quotation submitted will be deemed to remain open for acceptance or non-acceptance for not less than 90 days from the closing date stipulated above. The Council may accept the quotation at any time within this prescribed period. The Council shall however not be bound to accept the lowest or any quotation and may accept any offer in whole or in part. | |
|  | **3.3** | You must not make any changes to the text of the document as supplied to you – we shall evaluate your Quotation (and may award a contract) on the basis that no such changes have been made. | |
|  | **3.4** | The Council reserves the right to cancel the tender process at any point.  The Council is not liable for any costs resulting from any cancellation of this tender process nor for any other costs incurred by those bidding for this Contract. | |
|  | **3.5** | Bidders shall be deemed to have satisfied themselves before submitting a bid as to the accuracy and sufficiency of the rates and prices stated by them in their bid, which shall (except in so far as it is otherwise provided for in the Contract), cover all their obligations under the Contract, and they shall be deemed to have obtained for themselves all necessary information as to risks, contingencies and any other circumstances which might reasonably influence or affect their Bid. No claim for payment will be considered on the grounds of misunderstanding or lack of knowledge or information. | |
|  | **3.6** | Where errors or discrepancies are found that may affect the quotation sum, the Bidder will be notified and given the opportunity to confirm the submitted sum without amendment or withdraw their bid. | |
|  | **3.7** | Where insufficient information is provided in relation to any specific criteria, no credit will be given for that aspect of quality. | |
|  | **3.8** | Where a Bidder wishes to submit a modified or alternative bid this must be in addition to the original quotation submission and may or may not be considered by the Spending Officer. Any modified or alternative bid must be free of qualifications and state all cost implications. Any deviations from the specification and all risks and contingencies must be identified. | |
|  | **3.9** | The Invitation to Quote includes the Council’s Contract Terms. Bidders may state any proposed amendments to the terms which they consider necessary to clarify the basis of their bid in their response to the contract documents which may or may not be accepted by the Spending Officer. | |
|  | **3.10** | Bidders shall not discuss the bid they intend to make other than with professional advisers or joint bidders who need to be consulted. Bids shall not be canvassed for acceptance or discussed with the media or any other tenderer or member or officer of the Council. | |
|  | **3.11** | If a bidder does not observe paragraph 3.10, the Council will reject the quote and may decide not to invite the applicant to quote for future work. | |
|  | **3.12** | Where signatures are requested, typed entries are acceptable. Electronic Signatures are not required. | |
| **4.** | Evaluation Criteria | | |
|  | **4.1** | The contract will be awarded on a quality price model, with a weighting:   * Quality = 70% * Price = 30% | |
|  | **4.2** | Bidders will be evaluated to determine the most economically advantageous Quotation taking into consideration the following quality criteria:  **Methodology - weighting 20%**  Bidders should explain how the commission would be undertaken. In assessing bids we will consider your:   * Understanding of the local Fylde Coast context. * Proposed methodology and approach to the housing needs assessment.   **Engagement – weighting 10%**  Bidders should provide evidence of a clear engagement strategy designed to inform the assessment of need. In assessing bids we will consider your approach to engaging with relevant stakeholders, council officers and members, town/parish councils and local communities (where required and appropriate) and others deemed to have an appropriate input.  Your submission should include evidence that the suggested approach has been applied successfully as part of previously undertaken housing needs assessments by the consultancy.  **Project management – weighting 10%**  Bidders should explain how the project will be managed. In assessing bids, we will consider your:   * Work programme. * Project management arrangements. * Approach to keeping the project within agreed timescales and budget. Daily rates for each person assigned to the project and the time assigned to the project.   **Depth of relevant skills, knowledge, and experience – weighting 15%**  Bidders should describe the quality of the consultant team, including a description of the roles, qualifications, and experience of those who are proposed to undertake the work. This should be evidenced through a proven track record of undertaking comparable recent studies on behalf of local authorities. Where appropriate the soundness and robustness of these at examination or public inquiry should be evidenced.  **Interview/Presentation – weighting 10%**  Depending on the submissions received, if required, selected bidders will be invited to an interview, including presentation, to clarify and test aspects of the submission. This will include (but not be limited to) reality checks on the information provided in their submission. The interview panel will consider the overall quality of the interview and interview presentation.  **References – weighting 5%**  Three references from previous comparable work carried out in the past four years. The Council will select two of these at random to contact. | |
|  | **4.3** | Quality evaluation will be made under the criteria listed above, and the information required from the Bidders will be scored on the following basis: | |
|  |  | **Score** | **Description** |
|  |  | 0 | The Evaluation Panel felt that none of the requirement was met or demonstrated, or no response was provided. |
|  |  | 1 | The Evaluation panel felt that a few areas (20% or less) of the requirement has been met or demonstrated. |
|  |  | 2 | The Evaluation panel felt that some areas (between 21% and 59%) of the requirement has been met or demonstrated. |
|  |  | 3 | The Evaluation panel felt that most of the requirement (60% and above) has been met or demonstrated. |
|  |  | 4 | The Evaluation panel felt that the requirement has been fully met or demonstrated. |
|  |  | 5 | The Evaluation Panel felt that the Bidder had exceeded this requirement. |
|  | **4.4** | You should ensure that you adequately cover the specific points included in the evaluation criteria listed above in your quotation response. | |
|  | **4.5** | Where a score of 2 or above is not achieved for each element of the Quality Criteria, the quotation may not be considered further. | |
|  | **4.6** | During the evaluation period, the Council reserves the right to request samples or to seek clarification, in writing or by means of a clarification meeting, with any or all of the Bidders. | |

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|  | **4.7** | Price evaluation will be based on the following procedure:  In order to calculate a percentage score for each Bidder, the maximum price weighting of 30% will be awarded to the Quote offering the lowest tender price for the Services/Goods. The score for each of the other Quotes will then be reduced by the ratio of their price to the lowest price, as shown in the following example: -  Price Score = Price Ratio x Weighting  e.g., for quotation lowest price of £100,000 (Bidder A) and £300,000 (Bidder B):-  Bidder A score = 30 (full marks available)  Bidder B score = £100,000 x 30 = 10 (of 30 available)  £300,000 |
|  | **4.8** | All unit rates and prices must be quoted in £ Sterling, exclusive of VAT and inclusive of carriage and **all** other costs associated with the supply and delivery of the Goods, Works or Services which are the subject of this quote. |
|  | **4.9** | Bidders are expected to be aware of the likely price increases and therefore, all prices quoted are to be and guaranteed for the contracted delivery period and should be fixed from the date of submission of the quote to completion of the contract. Increases in prices, which occur after the agreed delivery period, will be borne by the successful Bidder. |
| **5.** | **Terms and Conditions** | |
|  | **5.1** | Successful Bidders will be required to adhere to the Council’s standard Terms and Conditions together with Special Conditions (if any) to all orders placed as a consequence of this process. The standard terms and conditions are available for viewing at appendix 4. Any Special Conditions will be set out in the Specification. |
|  | **5.2** | It is anticipated that the contract with the successful Bidder will commence from 11th December2023 at the latest and will run for a period of 3 months to 31st March 2024. |
|  | **5.3** | There will be an option to extend for a further maximum of 1 month. |
|  | **5.4** | Prices should be fixed for the contract period of 3 **months**, with the exception of pre-defined annual inflationary rises. |
|  | **5.5** | Acceptance of the Quote by the Council shall be in writing and shall be communicated to the Bidder. Upon such acceptance the Contract shall thereby be constituted and become binding on both parties and, notwithstanding that, the Contractor shall upon request of the Council execute a formal contract in the form contained in the Contract Documents. |
|  | **5.6** | Bidders must not undertake work without written notification that they have been awarded the contract and are required to start work. This is usually after contract documents have been executed. |
| **6.** | **Clarification** | |
|  | **6.1** | Should you require clarification in respect of anything contained within this ITQ documentation, you must submit your question via **The Chest** to the project contact by **noon 27th October 2023.** |
|  | **6.2** | The Council’s responses to any queries or clarification requests may, at the Council’s discretion, be provided to all consultants invited to submit a quotation. |
| **7.** | **Amendments** | |
|  | **7.1** | The Council may amend the quotation documents at any time prior to the deadline for receipt of quotations. Any such amendments will be provided to all consultants invited to submit a quotation. |
| **8.** | **Insurance Indemnities** | |
|  | **8.1** | The Council will require for Public Liability insurance a minimum indemnity of £5m for manual work undertaken on behalf of the Council with a copy of the original certificate. |
|  | **8.2** | The Council will require for Employer's Liability insurance a minimum indemnity of £10m for manual work undertaken on behalf of the Council with a copy of the original certificate. |
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| **9.** | Quotation Procedures | |
|  | **9.1** | Your quotation must be submitted on the quotation form attached in **Appendix 2** and returned via **The Chest**. |
|  | **9.2** | Quotations must be received **by noon 3rd November 2023 via The Chest.** Quotations received after this will be disregarded. It is the Bidders responsibility to ensure the quotation is received before the stated deadline. |
|  | **9.3** | The Council may reject the quotation if all parts of the quotation form have not been properly completed and the evidence requested supplied. |
|  | **9.4** | Quotations need to be delivered in the manner prescribed above and no quotation can be considered if sent in hard copy format by mail. |
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| **10.** | **Equality and Diversity** | |
|  | **10.1** | The Successful Bidder will be expected to comply with The Equality Act 2010. |
| **11.** | **Freedom of Information/ Transparency** | |
|  | **11.1** | Bidders should state if and why any of the information supplied by them is confidential or commercially sensitive or exempt from disclosure under the Freedom of Information legislation. However, notwithstanding the foregoing, the parties acknowledge that, except for any for any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act 2000 (“the Act”) the text of the Agreement, and any Schedules to the Agreement, is not Confidential Information. The Council shall be responsible for determining in its absolute discretion whether any part of the Agreement or its Schedules is exempt from disclosure in accordance with the provisions of the Freedom of Information Act 2000. |
|  | **11.2** | Notwithstanding any other term of the Agreement, the Bidder hereby gives its consent for the Council to publish the Agreement and its Schedules in its entirety, including from time to time agreed changes to this Agreement, to the general public in whatever form the Council decides. |
| **12.** | **Whistleblowing Policy**   |  |  | | --- | --- | | **12.1** | The Council is committed to the highest possible standards of openness, probity and accountability. Whistleblowing is intended to cover concerns that may fall outside other procedures such as the Council’s Complaints Procedure and encourages Bidders with serious concerns about any aspect of the Council’s work, to come forward and voice these concerns. These procedures are described in the document at **Appendix 3**. | | |
| **13.** | **Procurement Timetable**  It is anticipated that the following timescales will be applied. Changes may be made by the Council to any of these dates. In the event that this action becomes necessary the Council will advise the participants in the ITQ process. | |
|  |  | |  |  | | --- | --- | | **Timescale** | **Date** | | Invitation to Quote Issued | 9th October 2023 | | Deadline for clarification questions | Noon 27th October 2023 | | Deadline for tender submissions | Noon 3rd November 2023 | | Evaluation of tenders received | By 20th November 2023, at the latest | | Interview of shortlisted consultants (if required) | Week commencing 27th November 2023 | | Notification of result and appointment of successful consultants (or sooner if possible) | Week commencing 4th December 2023 | | Study commencement date and inception meeting (or sooner if possible) | Week commencing 11th December 2023 | | Final HNA completed (or sooner if possible) | 31st March 2024 | |

# APPENDIX 1

# SCHEDULE OF REQUIREMENTS

1. **Purpose**

The purpose of this commission is to provide an updated position for the local authority area whilst contributing to a robust evidence base for the purposes of the plan-making process.

[National Planning Policy Framework](https://www.gov.uk/government/publications/national-planning-policy-framework--2) (NPFF as updated September 2023) requires local authorities in preparing their local plans to consider the local housing needs for different groups (including but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, service families, travellers\*) and to reflect this in planning policies accordingly.

Wyre Council have commissioned a separate assessment for Gypsies, Travellers and Travelling Showpeople, therefore this will not be required within this commission.

The government expect local authorities to follow the standard method to calculate local housing need. Wyre Council will prepare a separate assessment of local housing need based on standard method for the whole borough, therefore this will not be required within this commission.

This brief sets out a broad methodology for the conduct of this commission. In summary, it involves:

1. The need for housing, broken down by tenure, type and size and their relation to different groups as specified in the NPPF and [[Planning Practice Guidance](https://www.gov.uk/government/collections/planning-practice-guidance)](https://www.gov.uk/government/collections/planning-practice-guidance) (PPG).
2. The likely need for the following types of specialist housing a) Retirement, assisted living, extra care accommodation b) self-build and custom-build housing c) Communal and student housing.
3. A requirement to capture the affordable housing need for the borough and broken down by distinct areas of the Borough (both urban and rural) by settlement to ensure that needs are met to the best effect. The settlements are defined in [Policy SP1(2)](https://www.wyre.gov.uk/downloads/file/1762/sp1)[[1]](#footnote-2).
4. Providing up to date housing evidence that is compliant with the NPPF and PPG[[2]](#footnote-3).
5. To determine whether existing and proposed discount market schemes are ‘affordable’ and whether the percentage discount applied and policy regarding income cap is sufficient for the Borough; or whether this should be broken down by distinct areas of the Borough. The commission should make recommendations based on justified evidence as to the level of discount and other criteria which should be applied on both discount market housing schemes and First Homes schemes (see 6. below).
6. Establishing whether the national ‘First Homes’ scheme and its criteria is suitable for the Borough or whether a further local criterion needs to be applied for the Borough or whether this should be broken down by distinct areas of the Borough
7. The commission is expected to take account of housing that has been delivered since the last needs assessment was undertaken.
8. **Background**

Wyre is a Lancashire coastal district, bounded by the sea along parts of its western and northern boundaries. It shared a common land boundary with the City of Lancaster to the north, with the Boroughs of Ribble Valley, Preston, and Fylde to the east and south respectively, and with the Blackpool Unitary Authority along the remainder of its Southwestern boundary. Wyre lies in the north of what collectively with Fylde and Blackpool is known as the Fylde Coast sub-region. Wyre however extends a considerable way in; and in the east and includes part of the Forest of Bowland Area of Outstanding Natural Beauty (AONB).

The northern coastline from Fleetwood to Pilling form part of Morecambe Bay which continues along the coastline to Barrow in Cumbria. Wyre itself is characterised by a distinct geographical polarity with the main urban areas situated in the West of the Borough, and a large expanse of rural area to the East. The urban areas are primarily situation on a peninsula west of the River Wyre, and includes the coastal towns of Fleetwood, Thornton and Cleveleys, and to the south, slightly inland, the market town of Poulton-le-Fylde.

The main rural area settlements with the most service provisions (i.e., shops etc.) are the market town of Garstang, Knott End/Preesall and Great Eccleston. The rural area is itself characterised by a large are of low-lying countryside and farmland, and east of the M6, the Bowland Fells which fall within the Forest of Bowland AONB. There are several settlements, which straddle Wyre Borough’s administrative boundary. These are Cleveleys and Normoss straddling the boundary with Blackpool; Little Eccleston straddling the boundary with Fylde; and Barton straddling the boundary with Preston. In the north, Lower Dolphinholme adjoins Dolphinholme in Lancaster and together the two places are considered as one community. Great Eccleston, close to the boundary with Fylde, functionally links with communities in Fylde as it provides services for them including school and health provision.

Wyre as part of the Fylde Coast Sub-Region has strong functional links but also a close working relationship with Blackpool and Fylde. The three authorities share a common housing market area and have established an Economic Prosperity Board (EPB).

Housing Needs of the Borough were last assessed as part of the [Fylde Coast Strategic Housing Market Assessment (SHMA)](https://www.wyre.gov.uk/downloads/file/503/fylde-coast-shma-report-2014) 2014 which covered the three Fylde Coast Authorities Fylde, Blackpool, and Wyre, which make up the Fylde Coast Housing Market Area. This was subsequently supported by three addendums and a further supplementary note [Fylde Coast SHMA - Wyre Addendum 3 - Size and Type of Housing Needed in Wyre](https://www.wyre.gov.uk/downloads/file/520/technical-note-size-and-type-of-housing-needed-in-wyre) completed in May 2018.

Affordable housing for rent in the Borough is provided by a partnership of 13 Registered Providers and is allocated by the choice-based lettings (CBL) scheme [www.MyHomeChoiceFyldeCoast.co.uk](http://www.MyHomeChoiceFyldeCoast.co.uk); which is a joint scheme covering the neighbouring Boroughs of Blackpool and Fylde.

The [Wyre Local Plan (2011-2031) (incorporating partial update of 2022](http://www.wyre.gov.uk/planning-policy/local-plan-partial-review-2011-2031-1)) which was adopted in January 2023, stipulates an annual housing requirement of 296 units, based upon the Standard Method. The [Housing Implementation Strategy](https://www.wyre.gov.uk/downloads/file/1482/housing-implementation-strategy-2022-) published in 2022 showed the annual housing requirement figure had been surpassed between 2020-22 and was anticipated to continue this trajectory until 2029.

The adopted Local Plan currently includes the following housing policies:

* Policy HP2 Housing Mix; This requires residential developments to provide an appropriate mix in terms of size, type and tenure of housing on new residential developments, in accordance with the most up to date housing evidence. The policy also requires at least 20% of dwellings within developments of 20 dwellings and above to be of a suitable design suitable or adaptable for older people and people with restricted mobility.
* Policy HP3 Affordable Housing. (see Table 1 below), which requires a proportion of affordable housing as part of certain market housing developments (new residential development of 10 or more dwellings [net]) and that the provision should be met on-site and be an appropriate size, type, mix and tenure. In exceptional circumstances, off-site contribution based on open market value of the units is required. The policy also refers to delivery of First Homes in accordance with national standards.
* Policy HP4 Exception Sites. This provides support for 100% affordable housing to come forward in certain circumstances outside defined settlement boundaries, as an exception to other planning policies usually known as rural exception sites. The policy also covers First Home/ Entry-Level exception sites.
* Policy HP7 Rural Workers Accommodation in the Countryside. This provides support where there is a functional need for rural workers to live in a specific location providing the business is viable and likely to remain operational. Need is established on a case-by-case basis.

Affordable housing in the Borough is currently delivered through:

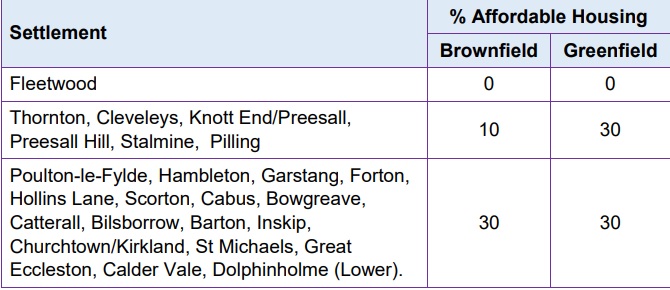
* Wyre Local Plan Policy ‘HP3 – Affordable Housing’ (see Table 1 below);
* Wyre Local Plan Policy ‘HP4 - Exception Sites’; or
* Schemes brought forward for entirely affordable housing, or for a proportion larger than policy thresholds, usually by Registered Providers.
* Table 1 Requirement for affordable housing (HP3):

Table 2 shows the number of Affordable Homes delivered in the last 5 years:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Affordable Housing delivery** | **2018/19** | **2019/20** | **2020/21** | **2021/22** | **2022/23** |
| TOTAL UNITS DELIVERED | 81 built and 108 demolished  -27 (net) | 130 (gross and net) | 148 (gross and net) | 261 (net) | 107 (net) |

The requirement for affordable housing under policy HP3 is geographically split due to viability and not reflective of geographical need. Wyre Council will prepare a separate assessment of viability of the Local Plan policies; therefore, this will not be required within this commission.

1. **2023 HNA Objectives**

The most recent HNA was produced several years ago. Therefore, this commission will provide up-to-date evidence to inform the emerging local plan for Wyre[[3]](#footnote-4). The commission will need to consider and review the broad strategic and policy context, including the following:

[Wyre Local Plan (2011-2031) (incorporating partial update of 2022)](https://www.wyre.gov.uk/planning-policy/local-plan-partial-review-2011-2031-1/8)

[Blackpool Borough Council Housing Affordability Study 2019](https://www.blackpool.gov.uk/Residents/Housing/New-housing-developments/Housing-affordability-study.aspx)

[Fylde Borough Council Housing Needs Study 2022](https://new.fylde.gov.uk/wp-content/uploads/2023/06/Fylde_Final_HNS_140922.docx)

[Fylde Coast SHMA](https://new.fylde.gov.uk/wp-content/uploads/2019/09/Fylde-Coast-SHMA-2014.pdf) and its Addenda [1](https://new.fylde.gov.uk/wp-content/uploads/2019/09/Fylde-Coast-SHMA-Addendum-1-November-2014-.pdf), [2](https://new.fylde.gov.uk/wp-content/uploads/2019/09/Fylde-Coast-SHMA-Addendum-2-May-2015-.pdf) and [3](https://new.fylde.gov.uk/wp-content/uploads/2020/08/EL7.002-Consultation-on-additional-evidence-August-2017.pdf), including [technical note](https://www.wyre.gov.uk/downloads/file/520/technical-note-size-and-type-of-housing-needed-in-wyre)

[MyHomeChoiceFyldeCoast Consistent Assessment Policy](http://www.myhomechoicefyldecoast.co.uk/content/Information)

[Wyre Council Rural Affordable Housing Needs Survey 2015-20](https://www.wyre.gov.uk/downloads/file/523/wyre-rurual-affordable-housing-needs-survey-2015-2020)

[Housing Implementation Strategy 2022-(wyre.gov.uk)](https://www.wyre.gov.uk/downloads/file/1482/housing-implementation-strategy-2022-)[[4]](#footnote-5)

This study will be required to assess the current position in the Borough as well as forecast for the emerging Local Plan (2022- 2040) as a minimum.

The 2023 Assessment is required to meet the following requirements:

* Provide up to date housing evidence that is compliant with the NPPF and PPG[[5]](#footnote-6);
* The need for housing, broken down by tenure, type and size and their relation to different groups as specified in the NPPF and [Planning Practice Guidance](https://www.gov.uk/government/collections/planning-practice-guidance) (PPG).
* Understand whether the tenures and sizes of home delivered in each area are meeting the needs arising in those specific areas;
* Complying with the PPG, to study the needs for and how to deliver accommodation for older and disabled people, students, agricultural workers’ accommodation, and all types of accommodation for affordable. Including specialist housing such as a) Retirement, assisted living, extra care accommodation, care institutions etc b) self-build and custom-build housing;
* Examine the profile of current housing stock in general in the Borough and identify any shortages in terms of size, type, and tenure. Including future forecasting regarding need;

To specifically support the delivery of affordable housing, also meet the following requirements:

* To establish the number of households which are in housing need, including homeless households, concealed households and overcrowded households;
* Establish the demand for affordable housing, split by tenure, area, and property size and type– broken down by area.
* Establish how many existing affordable housing tenants and market housing occupiers are in AH Need due to their current accommodation being unsuitable; past trends, factors driving, anticipated future trends including impact of national policy. This should include identification of households in need due to poor condition of existing property, fuel poverty/energy efficiency;
* Understand housing affordability in different areas i.e., household incomes of those in affordable housing need in relation to housing costs in the area;
* Understand any affordability gaps in the Borough, to consider income levels and housing costs by area (broken down by income whether earned or through benefits including number of earners in the household and whether they could raise any amount of deposit for an intermediate tenure);
* Understand the effectiveness of intermediate affordable tenures in meeting need through a survey of occupiers in intermediate units already enabled and housing providers and developers;
* Establish whether the Council’s policy regarding eligibility for affordable homes is fit for purpose; considering the current cost of living impact, increases to the real living wage etc – i.e., does the discount applied make the home affordable and is the income/earnings cap applied appropriate for our Borough. Is the local connection criteria in line with other authorities, based on evidence is it reasonable?
* Establish whether the national ‘First Homes’ scheme and subsequent national criteria is suitable for Wyre Borough or whether a further local criteria should be implemented.
* Establish the Affordable housing need arising in rural areas and reasonable suggestions as to how it can be met, having due regard to the Local Plan;
* This tender requires an exercise to gauge affordability levels in the Borough, to determine an average price for affordable units. This information will need to be used as evidence alongside establishing affordability for low wage earners as first-time buyers, understand the level of discount required and for those wishing to staircase upwards from their current home, to determine an average price.

Off-site affordable housing/Commuted Sums Calculator

We require our methodology for commuted sums to be reviewed. Our current commuted sums calculation for contributions for off-site/partial off-site affordable provision is several years old and needs to reflect current market values. We also need to review whether this approach to off-site contributions in exceptional circumstances is an appropriate response and whether our methodology is appropriate. This should include an assessment of best practice from other authorities' given that developers work across the Country. Where an alternative method is recommended, this should be agreed with the Council and then developed to reflect current cost to deliver affordable housing on the ground.

**METHODOLOGY**

Whilst it is for the consultants to establish and set out the methodology they intend to adopt for this commission, key requirements that should be addressed as a minimum include***:***

* Explanation of your recommended approach to analysing data sources and any known limitations.
* Justify assumptions, judgements, and findings in an open and transparent manner.
* Consider any cross-boundary implications of the report.
* Clearly reference all documents and data sources referred to and relied upon.
* Employ effective quality control mechanisms.
* Structured interviews to be undertaken with partners and stakeholders included but not limited to neighbouring local authorities, Registered Providers, Parish and Town Councils, developers and their agents, third sector organisations who are supporting people with their housing needs, NHS, Homes England, Ward Councillors, Lancashire Constabulary, Lancashire County Council as appropriate.
* Structured interviews to be undertaken with Council Members who have relevant portfolios, including planning and housing.
* To conduct a household survey for which you will be required to state what the minimum sample size should be to meet the objectives of this commission, including the need for a robust evidence base and how response rates will be maximised.
* Provide an engagement strategy to cover all engagement, with a specific focus on members of local communities or their representatives (i.e., parish/town and ward councillors); ideally you will provide evidence in your submission of successfully engaging with communities as part of previous commissions. We welcome alternative approaches which are proactive – such as the use of focus groups or contact with parish councils.
* To make recommendations on how to implement the findings.
* Explain and recommend how the assessment findings can be monitored and updated within existing council processes or external (if in house is not practicable).

***Analysis and Reporting***

This should be designed to deliver the desired outcomes below.

1. **Desired Outcomes**

The HNA will form part of the evidence base that informs and supports the local plan and affordable housing delivery policies. It should be objective, appropriate, proportionate, and robust. It should utilise where possible appropriate emerging best practice and advice and be NPPF/PPG compliant.

**Need**

The Assessment should gather sufficient appropriate information to determine the scale of need. The analysis should identify key issues, including those for service providers where relevant.

1. **Engagement**

Engage with key stakeholders, including Council officers as set out on page 20. The stakeholders listed in page 20 may not be exclusive, judgement will be required to identify other relevant stakeholders (previous undertaken work will evidence appropriate engagement strategies deployed for this type of commission). A detailed list of appropriate stakeholders will be provided at inception and confirmed as being appropriate by the council.

Details of the survey expertise and relevant experience of those conducting the household survey should be provided as part of the bid.

We will consider proposals from bidders as to how this element of the assessment is best managed for effectiveness, efficiency, and value for money.

The information gained by the study will assist in deriving policies and proposals that support an equality of approach to the planning of housing across all communities within the Wyre.

1. **The Final Report**

The output from this commission should take the form of a single report, which should include an executive summary. A presentation of the findings of the Report to Councillors and Officers in person will also be required. Any documentation produced must meet the government’s accessibility requirements.

The HNA Final Report should include (as a minimum):

**Background and context -** including review of national planning policy and guidance.

**Methodology** - being a description, with rationale, of the approach taken.

**Findings** - current and future needs, including total figures and delivery to the end of the local plan period of 2040; any statistical analysis of the survey results that is consistent with the study aims and objectives.

**Recommendations** – Practical measures and recommendations to address the findings.

*At least* one draft of the final report should be allowed for along with the production of working draft documents for comment by the Council.

It is crucial that this documentation is well presented and professionally produced. This will help us communicate the proposed policies and the evidence base that supports them. We will require an electronic copy of all documentation in relevant accessible formats such as PDF and where possible Word.

Ownership and copyright of all the outputs defined above will be retained by the Council.

**Please note that additional ongoing support may be required, for instance appearance at examination if necessary, at the agreed daily rate as set out within the submission.**

1. **Deadlines**

This commission will be completed no later than 31st March 2024**.**

1. **Project Management**

The main contact and project lead for this commission is:

Madison Yeo, Affordable Housing Delivery Officer, Wyre Council

Contact details: 01253 887246 [madison.yeo@wyre.gov.uk](mailto:madison.yeo@wyre.gov.uk)

1. **Budget**

This commissionhas a budget of circa £40,000 **(**exclusive of VAT)

Consultants should provide a breakdown of their fees for undertaking this work, including the fee structure (full time day equivalent rates) for the team who would be working on this assignment, including any sub-contractors as appropriate. The fee provided should be inclusive of all expenses, but exclusive of VAT. The fees must be in the form of a quote and not an estimate.

Wyre Council does not bind itself to accept the lowest, or any tender.

1. **Billing of Work Done**

Invoices shall be submitted for each stage on completion, as and when agreed by the council, for actual fees, expenses and disbursements incurred as per the agreed timetable and work programme.

1. **Tender Process**

Interested consultants should submit their proposal as a single whole document which should contain a clear statement setting out the following information:

* How the Study would be undertaken, this should demonstrate clear evidence and understanding of the brief, with a clear overall approach to the work and appropriate methodology to deliver the work programme, including establishing key milestones, and outputs from each stage. Specific details should be given in relation to their approach to engagement.
* The name and address of the firm(s) to be involved should be provided along with the name, address and telephone number of the person who will be responsible for the management and delivery of the study and for the day-to-day contact with the client (the lead consultant).
* Set out the identified team and staff who will be working on the study and their competence, qualification, and the experience of key professional members in successfully undertaking similar commissions with reference from previous work carried out in the past three years. The amount of time to be spent on the study by named personnel and support staff should be given.
* Details of the relevant experience of the firm(s) who have successfully undertaken similar commissions with reference from previous work carried out in the past three years.
* The timetable and work programme to undertake the study and the ability to work to the key milestones, with realistic number of days allocated to the project.
* Details of costs should be provided as detailed in section 9 above.
* The Quotation Form (Appendix 1) should form the first page of the tender document and provided with the tender submission.

After initial appraisals of the proposals received, if required, short listed firms will be invited to appear before an assessment panel. The nominated lead consultant shall attend. The date for interviews is expected to be w/c **27th November 2023 or earlier** if possible.

In determining the selection, Wyre Council will apply weightings to a number of criteria in its appraisal of the proposals, as outlined in section 4 Evaluation Criteria.

The following arrangements shall apply following any decision by Wyre Council:

* It is expected that the firm(s) will be informed of their success by **4th December 2023** or earlier
* Unsuccessful firms will be informed of the range of rates tendered on request.
* It is anticipated that appointments will commence **11th December 2023** and all stages will be completed by the end of the commission unless otherwise agreed beforehand by the client.

If, as a result of an enquiry, it becomes evident that the brief could be misinterpreted, any clarification required will be sent to all firms invited to tender.

# APPENDIX 2

# QUOTATION FORM

*(The Supplier completes this form)*

**QUOTATION FOR: HOUSING NEEDS ASSESSMENT (HNA) 2023**

**CLOSING DATE: Noon 3rd November 2023**

|  |  |
| --- | --- |
| DETAILS OF SUPPLIER | |
| Company name: |  |
| Address: |  |
| Quotation prepared by: |  |
| Address:  (If different from above) |  |
| Telephone Number: |  |
| Mobile Number: |  |
| Email address: |  |
| Signature: |  |
| Date: |  |

**APPENDIX 3**

# WHISTLEBLOWING and CONTRACTORS

**The Council’s advice to third parties contracting with it**

The Council is committed to the highest possible standards of openness, probity and accountability. In line with that commitment we encourage contractors and others with serious concerns about any aspect of the Council's work to come forward and voice those concerns. This document makes it clear that you can do so without the fear of discrimination or disadvantage

The policy applies to all contractors working for the Council on Council premises, for example, agency staff, builders, and cleaners. It also covers Suppliers and those providing services under a contract with the Council in their own premises.

This Whistleblowing Policy is intended to cover concerns such as:

* unauthorised use of public funds;
* possible fraud or corruption;
* health and safety risks;
* damage to the environment;
* sexual harassment or physical abuse;
* unethical conduct.

The Council will do its best to protect your identity when you raise a concern and do not want your name to be disclosed. It must be appreciated that the investigation process may reveal the source of the information and a statement by you may be required as part of the evidence, particularly if the Police or External Auditors become involved. In order to take effective action, the Council will need proper evidence which may be required to withstand examination in Courts or Tribunals.

As a first step, you should normally raise concerns one of the following senior officers of the Council:

* Chief Executive;
* Section 151 Officer;
* Monitoring Officer; or
* Head of Governance.

Concerns are better raised in writing. You are invited to set out the background and history of the concern, giving names, dates and places where possible, and the reasons why you are particularly concerned about the situation. If you do not feel able to put your concern in writing, you can telephone or meet the appropriate officer.

The Council will respond to your concerns. Do not forget that testing out your concerns is not the same as either accepting or rejecting them.

Within ten working days of a concern being received, the Chief Executive or relevant officer, depending upon whom you have approached and the circumstances of the case, will write to you:

* acknowledging that the concern has been received indicating how it is proposed to deal with the matter if possible at such an early stage
* giving an estimate of how long it will take to provide a final response if possible at such an early stage
* telling you whether any initial enquiries have been made, and
* telling you whether further investigations will take place, and if not, why not.

The full text of the Whistleblowing Policy is available on the Council’s website www.wyrebc.gov.uk

The policy is intended to provide you with an avenue to raise your concerns with the Council. The Council hopes you will be satisfied. If you are not, and if you feel it is right to take the matter outside the Council, the following are possible contact points:

* Audit Commission Anti-Fraud and Corruption Unit 020 7630 1019
* the Police 01253 293933.

**Appendix 4**

**PART I - STANDARD TERMS AND CONDITIONS FOR**

**THE PURCHASE OF SERVICES**

**PART II – SPECIAL TERMS AND CONDITIONS**

wyre Borough Council

STANDARD terms and CONDITIONS OF CONTRACT

FOR THE PURCHASE OF SERVICES

**See Separate Document**

1. Policy SP1 from the adopted Wyre Local Plan (2011-2031) (incorporating partial update of 2022) [↑](#footnote-ref-2)
2. This Study will not be required to assess the need for Gypsy, Travellers and Travelling Showpeople or establish the boroughs housing need using standard methodology. [↑](#footnote-ref-3)
3. The Plan period for the new local plans for Wyre is 2022-2040. [↑](#footnote-ref-4)
4. This will be replaced by the Housing Monitoring Report 2023, due to be published in autumn 2023. [↑](#footnote-ref-5)
5. This Study will not be required to assess the need for Gypsy, Travellers and Travelling Showpeople or establish the boroughs housing need using standard methodology. [↑](#footnote-ref-6)