**Appointment of a Technical Advisor – Specification**

**1. Brief**

Basildon Borough Council are seeking to procure the services of an individual qualified and experienced Technical Advisor to support with the CDC Project.

The Council has been approached by the Mid and South Essex NHS Foundation Trust (the ‘Trust') who wish to develop a Community Diagnostics Centre in the Basildon borough.

The Community Diagnostic Centre (CDC) programme is a national initiative to create Community Diagnostic Centres within the next 3 years.

The CDC programme aims to improve health outcomes by reaching earlier, faster, and more accurate diagnoses of health conditions; increased diagnostic capacity by investing in new facilities and reducing health inequalities by improving access and uptake of diagnostic tests.

The CDCs will contain a wide range of scanning and testing services with the aim to provide space for outpatient care. This will reduce patient attendance at hospitals and provide more community based and focussed services.

The Trust have previously secured a funding agreement for two CDCs, one in Thurrock and one in Braintree.

A third CDC opportunity has been considered across a number of potential sites in the Basildon borough. The Trust would like to progress discussions and negotiations, subject to the final grant funding decision from NHS England.

In broad terms, the CDC facility would be around 2,500m² plus up to 1500m² outpatient space, with a link for Primary Care where possible.

The timescales for delivery in line with the national programme grant are very short with the aim being to deliver at least some of the CDC services by April 2025.

The Council are assembling an Integrated Project Team to work in collaboration with the Trust on delivery of the CDC Project, and are looking for an experienced property individual to provide development management and property transaction support in the role of a Technical Advisor.

The resource will be an experienced and qualified Chartered Surveyor with direct experience of working on development agreements, leases and lease-back arrangements (and of the financial implications they may have for a local authority) and should have with experience of working with Hospital Trusts. A knowledge of the Basildon borough would also be advantageous.

The selected resource will be expected to work with Council Officers from services including Property, Finance and Legal in order to achieve transfer of the skill into the organisation for future projects.

**2. Requirements and Outcomes**

The key requirements of the Technical Advisor are:

* Advise on potential property transaction structures.
* Negotiate terms for the agreed structure on behalf of the Council with the Trust and other parties as may be required.
* Identify and manage any necessary title issues such as covenant removal or variation.
* Support the Project Team in financial analysis of the proposals to identify revenue and capital issues, costs and savings.
* Support the projection of estimates of cost and life cycle costings for any future space.
* Work with and support the Legal resource to finalise all legal documentation.
* Provide Technical Advisor and development management support to the Project Manager (and Project Team) throughout.
* Attend “Teams” meetings and as necessary meetings on site or in Basildon.
* To provide advice and a report confirming that the final agreements meet the requirements placed on the Council by s123 Local Government Act 1972.

The Technical Advisor will be part of the Integrated Project Team but will report specifically to the Councils Head of Property and Asset Management.

**3. Milestones**

Detailed below are indicative project milestones:

|  |  |
| --- | --- |
| **Task** | **Complete by** |
| Procurement of Technical Advisor | April 2023 |
| Finalise legal agreement’s structure and heads of terms, and progress legals | May 2023 |
| Report on Financial Implications | May 2023 |
| Cabinet decision | June 2023 |
| Planning Committee | July 2023 |
| Complete legal work (e.g. Exchange of Development agreement) | July/August 2023 |
| Works commence on site | October/November 2023 |

**4. Duration of Contract (start and end date) and Funding**

This commission will commence from April 2023 and is anticipated to be complete by the end of November 2023 (approximately seven months). Please note that as the project is based on a funding decision as per the specification, this timeline is indicative and may be subject to change. It is anticipated the Technical Advisor will be expected to work one day a week for a period of up to 7 months, but this may change as required by the client.

**5. Fee Proposal**

The council requires a fixed sum fee proposal for the specified work for the identified period and the outputs.

Fee proposals should indicate a fee charge in the event that the project does not progress to exchange of contracts.

A day rate should be provided as a costing for any additional work required beyond the brief, or beyond the timeframe as set out above.

**Appointment of a Technical Advisor – Pricing Schedule**

|  |  |  |
| --- | --- | --- |
| **Task** | **Fixed Fee**  | **Total Cost** |
| Finalise and progress legal agreements, including structure and heads of terms |  |  |
| Negotiate terms on behalf of the Council with other parties  |  |  |
| Identify and manage title issues (where required)  |  |  |
| Advise on property transaction structures including formal recommendation  |  |  |
| Financial analysis of options and structures, including implications and life cycle costings |  |  |
| Draft Cabinet Report |  |  |

Or, please enter alternative pricing (Day Rate and Total Cost):

**Appointment of a Technical Advisor – Scoring Criteria**

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| --- |
| **Evaluation Criteria** |
| **Evaluation**  | **% Sub- Weighting** | **% Weighting** |
| Direct experience of working on development agreements, leases and lease-back arrangements. | 20% | **70%**  |
| Experience of working with local government bodies and NHS Hospital Trusts  | 20% |
| Experience of drafting and negotiating property transaction structures  | 20% |
| Understanding of the Basildon borough, its towns and communities | 10% |
| Pricing Schedule | 30% | **30%** |
| **TOTAL** |  | **100%** |

|  |
| --- |
| **Criteria**  |
| Please provide details of your experience of working on development agreements, leases and lease-back arrangements. What was your involvement? How did you manage the processes? (20%) |
| *Maximum word count – 2000 words* |
| Please provide details of your experience of working with local government bodies and NHS Hospital Trusts. What was your involvement? How did you manage the different stakeholders? (20%) |
| *Maximum word count – 2000 words* |
| Please provide details of your experience of drafting and negotiating property transaction structures. What were the outcomes? Did you achieve the aims? How will you apply this learning in the future? (20%) |
| *Maximum word count – 2000 words* |
| Please demonstrate your understanding of the Basildon borough, its towns and communities (10%) |
| *Maximum word count – 2000 words* |