



THE WHALLEYS, SKELMERSDALE, WEST LANCASHIRE

Ecology and Landscape Works Brief

Version 1.0 26/08/2016

**INVESTING
NATIONALLY**

**DELIVERING
LOCALLY**



5. Date Response Required By:

NO LATER THAN 13:00 HOURS ON 13th SEPTEMBER 2016.

Tenders received after this time and date will not be included in this mini-competition.

Responses should be sent via the method detailed in Section 14. Responses received any other way will not be included.

The HCA reserves the right not to award this contract and does not have to award to the lowest bidder (see Section 14). In addition, the HCA reserves the right to procure only some of the services requested.

6. Brief Overview of Project:

1. Context and background

The Homes and Communities Agency (HCA) is issuing this Ecology and Landscape Brief as a mini competition process for the selection of consultants to provide ecological and landscape services to support the disposal of land at the Whalleys, Skelmersdale and its subsequent development. In responding to this brief, you will have confirmed your interest, capacity, resource, timetable and fixed financial offer to deliver the services described in this brief.

The Whalleys Site comprises five parcels of land, extending in total to 29.45 hectares gross (21.9 hectares net), and forms a northward extension of the developed area of Skelmersdale. The sites are set out on the site plan in Appendix A of this Brief:

- Site 2;
- Site 4;
- Site 5A;
- Site 5B; and
- Cobbs Clough.

The land parcels at Whalleys are being progressed as part of the Government's Land Auctions Pilot (LAP) initiative, which was launched by the 2011 Housing Strategy. This Pilot aims to capture a greater share of land value increase which results following grant of outline planning permission, for the benefit of the local authority. In the case of the Whalleys, WLBC will receive the uplift in land value over and above a base value which will be due to HCA.

In August 2014 WLBC secured outline planning consent for 630 dwellings at Whalleys (Application ref: 2013/1060/WL3) subject to a number of conditions and a unilateral undertaking pursuant to Section 106 (S.106) of the Town and Country Planning Act, 1990. The full marketing of the lead site (Site 4) took place in April 2015. It is now planned to bring to market in 2016 the remaining land parcels at Whalleys: Sites 2; 5A; 5B; and Cobbs Clough. The programme adopted aims to secure the rapid disposal of the sites in accordance with market conditions to meet the following LAP objectives:

- Achieve the objectives of the LAP Pilot thereby providing investment for WLBC to support Skelmersdale town centre regeneration;
- Bring public land to the market to increase housing supply; and
- Dispose of land in a timely manner at best value/consideration achievable.

It has been agreed between LAP partners that HCA will lead on the disposal phase of the project in a similar fashion to other large scale residential sites in Central Lancashire.

Ecology and Landscape



A suite of ecological and landscape surveys and assessments were conducted to inform the Environmental Statement which accompanied the application for outline planning permission. The following ecology and landscape activities have also subsequently been commissioned:

- National Vegetation Classification (NVC) and Invasive Species Survey of Cobbs Clough, Whalleys 2 and adjacent areas of Tawd Valley Park Biological Heritage Site (BHS), Bowland Ecology 2014;
- NVC of Whalleys 5, AECOM 2016;
- Updated Phase 1 Habitat Survey and Invasive Species Survey of Cobbs Clough, Whalleys 2 and Whalleys 5 and adjacent areas of Tawd Valley Park BHS, AECOM 2016; and
- Updated bat roost tree assessment and bat activity transect, AECOM 2016.

A range of on-site and off-site infrastructure provision and improvements will be implemented by the eventual appointed developers in accordance with the obligations and trigger mechanisms established in the planning conditions and the S.106 agreement signed by HCA and WLBC, including those relating to ecology and landscape. These were based on recommendations in the Environmental Statement and consultation responses received from Lancashire County Council (LCC) and Lancashire Wildlife Trust (LWT).

Planning Conditions

The following planning conditions from the outline application require ecology and landscape actions:

- Condition 6: Ecology and Landscape Strategy (ELS) including National Vegetation Classification (NVC) survey;
- Condition 7: Bat protection, mitigation and enhancement scheme;
- Condition 8: Landscaping scheme;
- Condition 10: Landscape Management Plan including details of habitat creation, management and maintenance;
- Condition 12: Construction Environmental Management Plan (CEMP) including update ecology and invasive species surveys to inform mitigation alongside details and timetable of measures to mitigate impacts on biodiversity relative to site investigation, site preparation and site clearance; and
- Condition 24: Avoiding vegetation clearance during breeding bird season unless absence confirmed through further surveys and inspections.

Section 106

Schedule 6 of the S.106 agreement that forms part of the outline approval sets out the biodiversity mitigation and enhancement measures that need to be submitted with each reserved matters application within the ELS, namely:

- (i) An NVC survey as to the current condition of the adjacent Tawd Valley Park BHS and the land subject to development;
- (ii) Avoidance of impacts and maintenance of bat roosting, foraging and commuting habitat during construction and operation (to include avoidance of artificial illumination of bat habitat; enhancements for bats to include the provision of new roosting opportunities within the built fabric of the development for species characteristic of the area) together with enhancement of bat foraging and commuting habitat (quantity, quality, connectivity);
- (iii) Adequate mitigation and compensation to maintain bird nesting and foraging habitat, including but not limited to grasshopper warbler and the breeding bird assemblage of scrub habitats together with mitigation and compensation for affected conservation priority ground nesting birds such as skylark and lapwing; compensation for loss of bird habitat not to be provided in the SUDS provision; bird nesting opportunities for species associated with the built environment (such as house sparrow, house martin and swift) to be included within the built fabric of the development;
- (iv) Maintenance of habitats of principal importance (hedgerows, woodland) and the habitat of

- species of principal importance (including but not limited to bats, birds, hedgehogs, possibly reptiles and amphibians);
- (v) Ongoing control of species listed under Schedule 9 of the Wildlife and Countryside Act 1981 (as amended), e.g. Himalayan balsam;
 - (vi) Details of habitat creation (species, establishment methods, aftercare etc.); and
 - (vii) Mechanisms for monitoring, review and amendment where necessary.

Additionally in relation to Whalleys 2 and Cobbs Clough, the following is required:

- (viii) Tawd Valley Park BHS: measures for the adequate protection and maintenance of biodiversity value during construction and operation, to include retention and management of substantial undeveloped vegetated buffer zones between development and the BHS, management of recreational impacts and remedial mitigation for any adverse operational impacts.

Table 1: Anticipated Approximate Programme, TBC within tender submissions and upon instruction

Date	Element
26 th August 2016	Issue Tender Document (this document)
26 th August – 13 th September 2016	Informal ability to view site and tender preparation period.
13 th September	Final Tender responses
19 th September	Appoint consultancy
End September	Ecology Surveys Complete
End October	Landscape Management Plan

7. Confidentiality:

Please note that all contents of this tender, including this document and all information supplied on separately are strictly confidential. They contain sensitive information and must not be disclosed to any third parties for any reason unless express permission is given by the HCA.

All information must be used only for the purposes of this tender and, if you are successful, the work outlined above. If you are not awarded this contract, you are expected to immediately destroy all paperwork through a confidential shredding process.

8. Information Supplied Separately:

Relevant information being supplied separately is as follows:

Appendix A – Site Plan

Appendix B - Resource Schedule Form

Appendix C - Detailed Requirements Document

Appendix D - Desktop Review Document Electronic Links

Appendix E – Multiple Desktop Review Documents

9. Scope of Works:

This brief relates solely to the remaining three land parcels at Whalleys, namely Cobbs Clough, Whalleys 2 and Whalleys 5 (separated into 5A and 5B) as shown on the attached plan in Appendix A.

This commission requires consultants to provide the following range of services to update the existing ecological baseline principally established in 2013 and to comply with recommendations in the Environmental Statement, the planning conditions outlined above and Schedule 6 of the S.106:

- (i) Desk study;
- (ii) Terrestrial invertebrate scoping survey of targeted areas of habitat in each land parcel;
- (iii) Reptile survey on all suitable habitats at appropriate seasons;
- (iv) Bat surveys would be required should any trees need to be removed to ascertain whether they support roosting bats;
- (v) Badger survey on all suitable habitats and accessible adjacent areas to confirm the continued absence presented in the Environmental Statement;
- (vi) Ecological walkover of potential compensation land areas;
- (vii) Ecological input into the disposal briefs;
- (viii) Stakeholder engagement;
- (ix) Production of the ELS; and
- (x) Production of a landscape scheme and landscape management plan.

The above list is not exhaustive and is provided to indicate the key services likely to be required as the successful consultant is expected to play a key role within the team producing planning and disposal briefs and developing strategies including for open/play space, dealing with ground conditions, affordable housing, utilities and drainage due to be finalised in October 2016.

Please refer to Appendix C – Detailed Requirements – for the full overview of the works to be covered within this commission.

The following services will be procured separately by the HCA and are not part of this brief:

- Master Planning;
- Legal and Property;
- Valuation & Viability;
- Technical planning and project management advice and support to progress these sites for disposal and subsequent development; and
- Other environmental services, including but not limited to geotechnical, drainage, and highways/transport.

Response to Ecology and Landscape Brief

For the avoidance of doubt this is an invitation to tender and competitive bids are sought.

In responding to this brief, the only information that should be considered is contained within this document and attachments or otherwise communicated in writing.

Conflicts of Interest

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



10. Programme:

- The Ecology surveys will require completion by the end of September for inclusion in the finalised Disposal Brief alongside the revised Masterplan, Ecology and Landscape Strategy, and Landscape Scheme and Management Plan. This is expected to be issued for marketing in October 2016.
- The Ecology and Landscape Strategy in conjunction with the Landscape Scheme and Management Plan is to inform the Masterplan revision and the finalised Disposal Brief to be issued in October 2016.
- The Landscape Scheme Management Plan needs to be informed by the Ecology and Landscape Strategy and form part of the Masterplan and Disposal Brief for issue in October 2016.

Please include a full programme for your works, clearly including pre-works, site works, monitoring and reporting etc. You should include discussion of potential areas for programme slippage, if necessary, and ways you will aim to manage/mitigate these.

Please note that HCA has a responsibility to accelerate the release of public land and would like all works completed at the earliest possible opportunity.

11. Proposed Staff:

Please include a one page pen portrait for all staff to be used on this project and set out their time resource and cost in Appendix B - Resource Schedule Form.

Your team of staff should include suitably qualified and experienced personnel for all works, monitoring staff, risk assessors etc.

12. Management Arrangements:

HCA

This instruction is made directly by the HCA for work in relation to land under its ownership (see Appendix A). [REDACTED] will be the key points of contact (see section 3).

The primary relationship will be with the HCA, however it should also be noted that the appointed team will also be expected to report to and integrate their subsequent work programme with HCA's appointed consultant team(s) to ensure all necessary information is provided as required and integrated into the wider disposal programme to ensure there are no delays.

Funding to deliver this work has been identified within HCAs current financial programme and the chosen consultant will be appointed under HCA's panel arrangements, with a duty of care to HCA.

Project meetings will be held when appropriate based upon progress within the project. Attendance at project meetings will be required but will be at the instruction of HCA. Project meetings may also include representation from WLBC.

As per the terms of the HCA multidisciplinary panel contract there will be a requirement to provide collateral warranties and HCA will issue a purchase order subject to the HCA multidisciplinary framework contract.

Consultant

Please provide any relevant details for the management of the project. This may include health and safety as well as time/personnel management, as relevant.

Please provide an outline of the work phases and key deliverables and any areas where slippage may occur and how you aim to manage these so as to keep to the timetable in Section 6.

Please indicate who will be the main client contact and how the HCA will be informed of progress - a single point of contact for all liaison is required.

13. Tender Responses to Include:

It is acknowledged that this tender has a short turnaround period. Therefore, please limit your tender response as much as possible to pertinent information and justification, to include as a maximum:

1. Method - Outline of how you will complete the work. Where tenderers intend to deviate from the scope provided this should be stated, justification provided and additional costs over and above those related to the existing scope of works made clear.
2. Staff pen portraits (maximum one sheet A4 per person);
3. Costs (using HCA framework rates) broken down for each staff member to show fixed amounts for each stage of the project for each site (Appendix B to be updated with all resources and costs);
4. Indicative detailed programme, including areas that may cause delay and how these will be managed and/or mitigated (maximum two pages in 11pt Arial font);and
5. Any other pertinent information.

All queries should be directed to Mark Phillips or Andrew Moss (contact details in Section 3 above).

14. Tender Return and Assessment Criteria:

The HCA reserves the right not to award this contract to any tenderer and not to award to the lowest priced tenderer. The HCA may also only procure part of the works proposed.

Costs will be assessed on a value for money basis. In order to do this, all staff costs must be fully broken down using the Resource Schedule Form (Appendix B), together with any other deemed works or expenditures.

The Panel consultants should set out a budget which will be appropriate to undertake the scope of work identified. It is suggested that estimated fees are proposed against a breakdown of areas of work required.

The fee submitted should be a maximum fixed fee and will not be subject to review once the instruction commences, unless there are very exceptional circumstances where additional work (which could not be foreseen) is required.

The reimbursement will be on lump sum basis, based on hourly rates for named staff. Payments will be on a monthly basis in proportion to progress achieved.

TENDERS SHOULD ARRIVE NO LATER THAN 13:00 HOURS ON 13th SEPTEMBER 2016.

Tenders should be submitted to [REDACTED] Submissions should be clearly marked within the SUBJECT LINE.

FAILURE TO COMPLY WITH THIS MAY MAKE YOUR SUBMISSION INELIGIBLE.

Tenders received after this time/date, or with missing information, will not be included in this mini-competition.

All eligible bids will be assessed using the following 70:30 Price / Non-Price evaluation framework as follows:

Table 2: Assessment Protocol

Element		Sub-Score	Score
Technical	Method.	10	30
	Staff experience	10	
	Timetable for works and ability to meet programme.	5	
	Management and communication.	5	
Price	Cost & Resource Plan (£) – see Appendix B	70	70
		TOTAL	100

