**Request for Quotes**

**Energy and Sustainability Support for the Planning teams**

**Contract Period: 1 February 2020 – 31 January 2023**

# Summary

1. Lambeth are seeking to appoint a consultancy to provide support to the Planning teams for 3 years. The support would be primarily to our Development Management team to enable it to deliver against its current planning policies and service delivery targets. This support will comprise of assessment of energy and sustainability submissions that accompany relevant planning applications (excluding applications which are subject to Planning Performance Agreements) and condition/s106 discharge applications. There is also some additional support required for our Planning Policy Team.
2. This brief sets out:
   * Context – the background and context of the opportunity
   * Specification – what we are looking for
   * Timescales – response deadlines, evaluation timescales, and proposed start date
   * Tender Evaluation process

# Context

1. Lambeth was one of the first councils to declare a climate emergency. Lambeth’s buildings are a physical embodiment of the Council’s commitment to sustainability, tackling and adapting to climate change. Lambeth is a central London authority that deals with a wide range of planning applications; ranging from large scale redevelopment projects in the London Plan designated Waterloo and Vauxhall opportunity areas; to estate renewal schemes; to residential extensions and alterations.
2. Lambeth Council, through the exercise of its Development Management function, seeks to ensure that future development within the borough achieves the highest standards of sustainable design and construction and subsequent operation. In particular, Lambeth requires all major developments to achieve a reduction in carbon dioxide emissions in line with London Plan targets through energy efficient design, decentralised heat, cooling and power systems, and on-site renewable energy generation; and requires all other developments to achieve the maximum feasible reduction in carbon dioxide emissions through these measures.
3. Lambeth referred an average of 250 applications for independent sustainability advice per year over the last two years. These were made up of:
   * 20% Major applications;
   * 35% Minor;
   * 2% ‘Other’ applications;
   * 38% Discharge of condition applications; and
   * the remainder being pre-application requests.

Please note that the number of applications previously referred may be higher or lower than that over the new contract period. Lambeth may also develop in-house capacity during the contract period.

The applications are of varying complexity. It should be noted that not all applications submitted to the council will include energy and sustainability submissions and not all applications including energy and sustainability submissions will necessarily be passed for external assessment.

1. Through its Planning Policy function the council is required to monitor the Key Performance Indicators as set out within its Local Plan, which include evidence of the carbon reduction levels achieved through major developments (as assessed through the process above).
2. It is also developing a new design and viability tested approach to the development of a Site Allocations DPD (SA DPD) which will require some additional support in relation to the most appropriate means to achieve the reduction in carbon dioxide emissions as set out within the London Plan for approximately 10-15 potential site allocations. The site assessments will need to take into account the planning constraints and opportunities, site context, character of the area and its connectivity, scale and density of proposed options, optimum layouts, heights and mix of uses for each site.

Key to this will be sustainability targets and environmental design options which will inform the emerging design and the alternative development scenarios. Therefore, the Council’s policy team is also looking for support from a sustainability and energy consultancy with ideally, in house engineering expertise to help the Council’s site assessment team with site appraisals, feasibilities and preferred design option proposals for each site over the next year. The team would also need assistance in assessing and setting sustainability targets and briefs for each site bearing in mind particular site context constraints and opportunities.

# Specification

1. Lambeth are seeking to appoint a consultancy to provide support to its Planning teams. The work will be split into two main work areas:
   1. Support for the Development Management team.
   2. Support for the Planning Policy team.

**i. Support for the Development Management team**

1. This support will comprise of assessment of energy and sustainability submissions that accompany relevant planning applications (excluding applications which are subject to Planning Performance Agreements) and condition/s106 discharge applications. We estimate this will be around 85% of all the work.
2. Following assessment, the Council will require you to advise on the degree of compliance with current planning policy requirements, on potential amendments that would further improve the performance of the developments and on suggested conditions and planning obligations that would ensure the delivery of the highest standards of sustainable design and construction and subsequent operation. A timely response to all consultations will be expected to enable the council to deliver against its statutory planning application performance targets – 8 weeks for minor and other applications and 13 weeks for major applications.
3. The selected contractors delivering the service will be required to collaborate remotely with officers within the Development Management service. The provision will be for an off-site, electronic service. Meetings and site visits for more complex sites may also be required from time to time.
4. It is not possible to predict an exact workflow arising from planning applications. Lambeth will therefore require a degree of flexibility to account for peaks and troughs of submission, so as to ensure optimum service delivery. The full value of the contract cannot however be exceeded in the 3 year period. The cost of the contract will be monitored on a monthly basis, along with the quality of advice being provided.
5. Key outputs will include:
   * Assessment of the energy and sustainability submissions of planning applications for compliance with Lambeth Council and London Plan policy.
   * Assessment of condition discharge and S106 discharge applications.
   * Input into the development of standard conditions for energy and sustainability.
   * Support in the development of relevant emerging Local Plan Policies
6. The types of applications requiring assessment will fall into 5 main category areas:

Major, Minor, Other, Discharge of Conditions (Approval of details), and Pre-applications.

Major, Minor and Other applications are as defined in the MHCLG PS1, PS2 returns guide:

<https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/793753/PS12_Guidance_201903.pdf>

1. Proposals should include an estimate of the average time to provide assessment on the 5 different application categories along with an hourly rate.

**ii. Support for the Planning Policy team**

1. The service will also be seeking additional support for its Planning Policy Team. This support will form two separate tasks.
2. The first will be in the form of help in monitoring policy implementation in Lambeth’s Annual Monitoring Report (AMR):

* Six monthly reports on the number and type of **major** applications that are submitted for review
* These reports to include:
  + analysis of the level of carbon reduction applicants are proposing to achieve on submission – through design of the scheme/and or off-site contributions
  + analysis of the level of carbon reduction achieved on grant of permission - through design of the scheme/and or off-site contributions
  + overall summary of performance against London Plan policy 5.2 (to be replaced by Policy SI2 from the new Draft London Plan when formally published) and Local Plan policy EN4 and assessment of any issues encountered with policy implementation

1. The second part of the planning policy work will include providing advice on the most appropriate means of achieving the carbon reduction emissions targets and other sustainability solutions, specific to each potential site allocation within a forthcoming Site Allocations DPD. The overarching sustainability aims are driven by the emerging London and Local Plan policies and Building Regulations Part L, F and Future Homes Standards 2025 currently out to consultation. However, future proofing against the likely emerging technologies, changing legislation, energy prices and market demands will also be crucial in this. Therefore, the council will seek to make sure any emerging carbon reductions and sustainability targets are met as a minimum. Through this work officers will be seeking advice on how these requirements could be met in relation to carbon emission reductions and sustainability standards for each site allocation, and a brief will be provided for each site allocation where advice is required at the time of advice being sought. However, advice will also be sought from other experts in relation to water; waste; transport and accessibility, air quality and noise; and daylight and sunlight which the sustainability consultancy will need to review, consider and incorporate into the advice given.
2. The council is still finalizing the list of sites and boundaries but for the purpose of the quote please assume advice may be sought on up to 15 sites (greater than 0.25ha in area but unlikely to be greater than 1.5ha). Proposals should make clear the pricing structure for each site and all exclusions should be clearly stated. The tender returns should also clearly state if any site visits have been included in the quote and whether this will be delivered by written advice, meetings or workshops (if any) and if so how many would be allowed for each site.

**Your quote**

1. Proposals should cover the all the components identified in the specification. It is recommended that proposals are kept to a maximum of 10 pages, excluding CVs.
2. The proposals presented should not exceed £99,000 (excluding VAT) for the 3-year period. Proposals that exceed that amount cannot be considered for an award.

# Timescales

1. A timetable for the selection process is detailed below:

|  |  |  |
| --- | --- | --- |
| **Stage** | **Component** | **Indicative timescale** |
| Request for quotation | Requests distributed | 15 November 2019 |
| Clarification question closing date | 29 November 2019 (12 Noon) |
| Proposal submission deadline (Closing date) | 6 December 2019 (12 Noon) |
| Selection | Proposals shortlisted / scored | 13 December 2019 |
| Successful applicant selected and confirmed | 20 December 2019 |
| Contract Commencement | Successful applicant commences contract | 1 February 2020 |

Table 1

1. Any clarifications questions and proposal should be submitted to [thamilton@lambeth.gov.uk](mailto:thamilton@lambeth.gov.uk) by the relevant deadlines as per Table 1 above.
2. The proposed period of the contract would be from 1 February 2020 to 31 January 2023.

# Tender Evaluation

1. The standard ratio that will be used to evaluate the tenders is as follows:
   1. Quality – 60%
   2. Price – 40%

**a. Quality evaluation**

1. Proposals should take into account the requirements laid out in the specification section of this document.
2. The proposal components along with the minimum acceptable score, maximum score available and weighting are set out below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Type** | **Questions** | **Weight**  **0-5** | **Max Score** | **Max Score available (Weight x Max Score)** |
| **Methodology** | 1. Please detail your understanding of the brief and knowledge of the policy requirements of the emerging London Plan, Local Plan, emerging Building Regulations and Future Homes Standard 2025. | 3 | 5 | 15 |
|  | 1. Please provide detail of how you would approach providing advice and support in relation to policies relevant to sustainable design and construction and providing site-specific advice of how to best achieve relevant and best practice standards of sustainable design and construction. | 3 | 5 | 15 |
| **Service Management and Delivery** | 1. Please describe your availability and capacity to start work and deliver to timescales | 3 | 5 | 15 |
|  | 1. Please outline the monitoring systems that you will use to manage and record applications | 3 | 5 | 15 |
| **Provision and Quality of Service** | 1. Please provide the names, CV’s, professional membership details, roles and the technical expertise & experience of the consultants that will be assigned to this project and their experience in providing assessments. Please also state if any aspects of the brief scope are to be subcontracted to external and/or subsidiary companies/organisation. | 3 | 5 | 15 |
|  | 1. Please provide evidence of delivering sustainable design and construction support to planners and developers | 5 | 5 | 25 |
| Total |  |  |  | 100 |

Table 2

1. The components which are indicated with appropriate weightings will be evaluated by the panel and the appropriate score will be agreed and added to form the total Quality Evaluation Mark. The score achieved for this section, Quality Evaluation Mark, will be weighted at 60% to give the final score for quality (Quality Score).
2. The council reserves the right to challenge any information provided in response to the RFQ and request further information in support of any statements made therein.
3. Potential providers must achieve the minimum acceptable Quality Score of 3, for each of the component areas in the table above. Only those responses which achieve or exceed the minimum for all component areas will be included in the Price Evaluation Process.
4. Where only one (1) submission is received and it does not meet the minimum acceptable score, the council reserve the right to enter into dialogue and seek assurances regarding the delivery of the requirement.
5. The scoring matrix:

|  |  |
| --- | --- |
| 0 | Failed to address the question/issue. |
| 1 | An unfavourable response/answer/solution. There is limited or poor evidence of skill/experience sought; a high risk that relevant skills will not be available. |
| 2 | Less than acceptable. The response/answer/solution/information lacks convincing evidence of skill/experience sought; lack of real understanding of requirement or evidence of ability to deliver; medium risk that relevant skills or requirement will not be available. |
| 3 | Acceptable response/answer/solution/information to the particular aspect of the requirement; evidence has been given of skill/experience sought. |
| 4 | Above acceptable – response/answer/solution/information demonstrates real understanding of the requirement and evidence of ability to meet it (based on good experience of the specific provision required or relevant experience of comparable service or supply. |
| 5 | Excellent – response/answer/solution provides real confidence based on experience of the service or supply provision required. Response indicates that the supplier will add real value to the organisation with excellent skills and a deep understanding of the service or supply requested. |

Table 3

1. The weighting of each criterion is based on a scale of 1 – 5; 1-2 being low importance and 4-5 being highest in importance:

|  |  |
| --- | --- |
| 1 | Low Importance |
| 2 | Not Very Important |
| 3 | Important |
| 4 | Very Important |
| 5 | Extremely Important |

Table 4

**b. Price Evaluation**

1. For the price evaluation, each submission will be assessed on the total cost of delivering the programme over the 3 years.
2. To allow us to evaluate the price all proposals should include a detailed summary of the proposed costs for the three requested areas of work, as described in the specification. For the avoidance of doubt, we expect all proposals to include clear costs for the items in tables 5 and 6 below.
3. **Support for the Development Management Teams**

Assessment of energy and sustainability submissions that accompany relevant planning applications, along with provision of advice on the degree of compliance with current policy requirements and potential amendments to improve performance. For each application type please provide an estimate of the average time to provide assessment on the 5 different types of application category along with an hourly rate:

|  |  |
| --- | --- |
| **Application type** | **Required submissions** |
| Major | Average hours per application (hr) |
| Cost per hour (£ excl. VAT) |
| Minor | Average hours per application (hr) |
| Cost per hour (£ excl. VAT) |
| Other | Average hours per application (hr) |
| Cost per hour (£ excl. VAT) |
| Conditions | Average hours per application (hr) |
| Cost per hour (£ excl. VAT) |
| Pre-application | Average hours per application (hr) |
| Cost per hour (£ excl. VAT) |

Table 5

1. To price the ‘support for the development management teams’ work for evaluation purposes, we will use the average number of applications in recent years (as defined in the ‘Context’ section), to calculate a total estimated cost for the 3 years of the contract.
2. **Support for the Planning Policy team**

Please provide total cost estimates for the two areas of work supporting the Planning Policy team. As described in the specification:

|  |  |
| --- | --- |
| **Description** | **Required submissions** |
| Provision of 6 monthly monitoring reports for the Council's AMR. | Please provide a cost for the full three years of the contract for the work. |
| Provision of energy and sustainability advice related to 15 sites for the Council's forthcoming Site Allocations DPD. | Please provide the pricing structure for a site as described in the specification. State any exclusions. State if any site visits have been included in the quote and whether this will be delivered by written advice, meetings or workshops (if any) and if so how many would be allowed for each site. |

Table 6

1. The costs of provision of the ‘support for the development management teams’ will then be added to the quoted costs of the ‘support for the planning policy team’ work to calculate an overall Quote Price.
2. To calculate the Price Score we will use the ‘difference from the lowest tendered price’ method and the following equation:

Price Score % = (100% - ((Quote Price – Lowest Price)/ (Lowest Price))) multiplied by 40

The Lowest Price in the equation above will be the quote with the submitted lowest price where the Council believes, from the information submitted in the quote, that the services can be delivered in accordance with the minimum acceptable quality score in each area and contract terms and conditions.

1. The proposals presented should not exceed £99,000 (excluding VAT) for the 3-year period. Proposals that exceed that amount cannot be considered for an award.
2. **Final Score**

The Price Score (40% weighting applied), is added to the overall Quality Score (60% weighting applied), to give a final score for each Potential Provider (Final Score).

The contract will be awarded to the supplier with the highest Final Score. Feedback will be supplied to unsuccessful bidders on request.