



Invitation to Quote in a Mini Competition

1. Project Name:

Portland School Sites: Starter Home Acquisitions

Site Address:

- (i) Royal Manor Arts College, Easton, Portland DT5 2RS – 2.458Ha. / 6.07acres
- (ii) Southwell primary school, Southwell, Portland DT5 2DT – 1.306Ha. / 3.22 acres

See site plans in annex 1 and 2.

2. HCA contact:

██████████, Area Manager, ██████████

3. Date Response Required By:

Please submit your tender response by **17:00 on Thursday 22nd December 2016** via email to ██████████

The HCA reserves the right not to award this contract and does not have to award to the lowest bidder. The tender will be assessed on a 50:50 split between Technical:Cost.

4. Brief Overview:

HCA is acquiring these former (now redundant) school sites from Dorset County Council (DCC). The parties intend to complete the freehold purchase/sale before 31st March 2017. Completion is subject to the following conditions:

- (i) Satisfactory completion of ground investigations including bearing test, contamination, review of historic mining/extraction activity etc
- (ii) Completion of a desk top archaeological review
- (iii) Satisfactory legal title report
- (iv) Satisfactory highway report identifying whether specific off-site highway works are likely to arise from redevelopment

We now wish to appoint a multidisciplinary team to complete (i), (ii) and (iv) above (**'Part 1 of the services'**) and to secure outline planning permission through the provision of supporting information (**'Part 2 of the services'**).

The Scope of Works outlined below in section 7 is not intended to be definitive or prescriptive. The appointment is to secure outline planning on both sites, therefore your tender should set out any additional work you think will be necessary. Your tender must include your fees and any sub-consultant or contractor fees (if relevant).

The target date for securing Outline planning on both sites is 31 October 2017.

5. Site Location and Information:

Plans for both sites are provided in annex 1 and 2. Annex 3 provides photographs and location plans.

Both schools closed in August 2016 following the completion of the new Maritime House academy campus school at Southwell, Portland which is owned and run by the Isle of Portland Aldridge Community Academy



(IPACA). The Maritime House campus brought together four separate schools on Portland onto one site.

Both sites are brownfield and within settlement boundaries were the principle of redevelopment for housing is acceptable. Neither site is identified in Weymouth and Portland BC's Strategic Land Availability Assessment, and will therefore provide new housing as a windfall.

6. Proposed End Use of Site:

Government is committed to building 200,000 Starter Homes (SH) over the course of this Parliament, to be offered exclusively to first time buyers under the age of 40 at a 20% discount to open market value, up to a maximum of £250,000/home (the discounted price). The Housing and Planning Bill introduces a statutory duty on local authorities to promote the delivery of SH and places a requirement for a proportion of SH to be delivered on all suitable reasonably-sized housing schemes. It also broadens the definition of affordable housing to include SH as an affordable home ownership product. The new regulations will, if published in time, inform our future planning applications.

In accordance with the planning exceptions policy (<http://planningguidance.planningportal.gov.uk/blog/guidance/starter-homes/starter-homes-guidance/>), commercial sites that are either vacant, under-used or unviable in its current or former use, and not currently identified for housing in a local or neighbourhood plan or within the authority's 5 year housing land supply can be brought forward for SHs using the HCA's SH Land Facilitation Fund.

These sites are vacant, with no market demand for community/education use. They provide an ideal opportunity for new housing. The proposal is to provide a minimum of 50% SH whilst maintaining scheme viability and ensuring the outline approval offers a development opportunity which is attractive to housebuilders and contractors on the HCA's Developer Partner Panel OR which could be built out via the Accelerated Construction route (HCA/Contractor partnership).. A flexible planning consent is therefore essential.

An initial phase of due-diligence has been completed on both sites. This resulted in indicative housing layouts of
c. 83 or 90 units for Royal Manor school – see indicative layout in annex 4
c. 55 units for Southwell – see indicative layout in annex 5

These layouts (which should remain confidential to the Agency), informed the valuation of each site but are illustrative only. The scope of service required under this commission is set out below. This includes architectural services under which the consultant may either suggest alternative layouts (in line with design principles and our overall objective), or develop these layouts further towards a planning approval.

7. Scope of Works:

The consultant is required to secure outline planning approval for each site. To that end, we anticipate that the following services will be required and your tender should cost each item separately, and include any and all sub-consultants fees as required. Please include any additional work which you think may be necessary to achieve planning.

1. Topographical Survey:

A 3D topographical survey is required for both sites, in line with TSA/RICS best practice – see specification in annex 6. The survey information is required in both PDF and CAD formats and assignable to the eventual developer(s).

2. Demolition and Refurbishment (Type 3) Asbestos Survey:

The consultant is required to carry out an Asbestos Demolition / Refurbishment Survey of all existing buildings on both school sites in accordance with the survey methodology as specified in the HSE's document [HS\(G\) 264 Asbestos: the survey guide](#). These should provide sufficient detail for drafting a works specification for the controlled removal of all ACM and demolition of all buildings.



DCC has provided an Asbestos Management Survey of each school (both dated May 2014). These will be made available to the consultant on appointment.

The Demolition/Refurbishment survey must comply with the HCA's Asbestos Policy and Procedures – available on request.

3. Services strategy report:

Provision of a report outlining the availability and capacity of existing utility supplies (gas, electricity, water, telecoms/broadband) to and around the two sites. In consultation with utility suppliers, the report will provide a services strategy for the proposed schemes as envisaged in the illustrative masterplans, such that the eventual developer of the sites can rely on this information in evaluating utility connection/supply costs.

4. Desk-top archaeological review:

We have carried out initial discussions with the Dorset County Archaeological Service [Steve Wallis, Senior Archaeologist, 01305 224222]. Whilst they have no record of any archaeological finds on either site, this requires further investigation via a desktop review (and potentially a walk-over survey) by a suitably qualified professional. Following consultation with DCC's archaeologist you will provide a report summarising the review findings, the likelihood of any archaeological finds and an outline proposal for fieldwork to satisfy the planning authority prior to an application and/or to satisfy usual pre-commencement archaeological conditions.

5. Ground Investigation/Geo-Environmental Survey:

A ground condition/environmental report will be required to support the planning application and future site disposal. This should identify underlying ground conditions, the extent and position of contaminated material, soil bearing capacity and the extent of abnormal foundation design required on each site (and likely cost) etc.

All works should be carried out in accordance with best practice and relevant technical guidance and to meet planning and environmental health requirements and should include the following:

- a. A geo-environmental assessment in line with the Chartered Institute of Environmental Health's Land Quality Management Generic Assessment. To include a desk-top review and adequate sampling and lab testing for screening against Generic Assessment Criteria for a residential end use.
- b. Groundwater laboratory analysis.
- c. Trial pitting, window sampling, dynamic probing, soakaway testing etc. the extent and locations to be agreed beforehand. All should be excavated to a suitable depth below ground level (bgl) and logged according to BS 5930, with a photographic record presented for each within the final report. All should be monitored by a PID, as relevant. All should be backfilled in the order materials came out and compressed in maximum 450mm layers. The final surface should be made good as best endeavours.

The consultant engineer will prepare a suitable report to withstand regulator scrutiny outlining all the above. This will include details of the underlying substrata with reference to the British Geological Survey (BGS), Environment Agency's Aquifer Mapping, historic land use maps and advise on the likelihood and impact of any current and historic mining in the vicinity. In addition the report should cover the following:

- Recommendation foundations for the site based on the indicative layouts.
- Provide heat maps showing varying depths of made ground and impact on foundation design for indicative layouts
- Foundation design implications for buildings and roads should be presented. The location of existing service utilities should be included on a plan. The GI should be provide sufficient detail



to allow a developer to accurately design and cost scheme foundations based on the indicative masterplan i.e. assuming development of 3 – 3.5 storey flats, 2 – 3 storey houses and roads etc.

- Recommendations in regard to cost effective cut-and-fill / earth work strategies which might affect layout design, including advice on cost (if required)
- Plans outlining areas of the site for any contaminants that fail the GQRA clearly showing fail/pass areas. As part of the report note any limitations to development (e.g. factors that may affect the positioning of buildings, roads, SUDS, etc) so as to ensure sustainable remediation.
- The location of service utilities should be included on a plan as indicated on any service plans and confirmed by on-site inspection.

All investigations should adhere to HCA panel warranty requirements - see the Multi-Disciplinary Framework Contract, clause 35 'Novation' and Schedule 9 'Deed of Novation' and consultant representations and warranties to any Successor.

6. Planning, Design & Consultation:

Planning and urban design is crucial to the success of this commission. We are seeking a well-qualified and effective town planning service, ideally with experience of successful working with Weymouth and Portland Borough Council. Planning & design will lead on the overall commission.

We are also looking for an experienced urban designer and landscape architect with a track record of developing high quality housing layouts, using principles which fit the best examples of housebuilder standard housetypes, without producing 'identikit' estates. We want illustrative development layouts, street scenes and a supporting Design and Access Statement which promotes a contemporary vernacular architecture, appropriate for Portland. Examples of contemporary vernacular architecture are cited below:

Osprey Quay, Portland

<http://www.hta.co.uk/projects/osprey-quay>

Triangle, Swindon

<http://glennhowells.co.uk/project/triangle-swindon/>

Osbalwick, York

<http://www.studiopartington.co.uk/projects/osbalwick>

Specific architectural services required include:

- a. Early formulation of the overarching layout and strategy to achieve planning consent, whilst ensuring flexibility and maximising development value;
- b. Support for the planning consultant in pre-application discussions with the LPA;
- c. Production of illustrative layouts, indicative street elevations and housetypes
- d. Production of a Landscape and Visual Impact Assessment if required by the LPA
- e. Production of the Design and Access Statement

The design strategy will apply the Starter Homes Exception Policy (March 2015) and harness the new legislation following the Housing & Planning Bill, all of which supports the delivery of starter homes as an affordable home ownership product for first time buyers.

The overarching approach seeks to secure an outline planning permission which fixes access to each site, maximises land value, creates certainty on s106 obligations and CIL charges whilst maintaining maximum flexibility for our development partner to secure their RM consent. However, the DAS should provide sufficient detail so that local consultation can be meaningful and set out principles against which eventual developer submissions can be judged. The layouts and DAS should also reflect the Starter Homes Design Guidance (March 2015) published by DCLG:



see <https://www.gov.uk/government/publications/starter-homes-design>

The approach towards consultation should not be overblown and should reflect the fact that this is a small urban infill development. The consultation strategy should be formulated to achieve consensus, enable local stakeholders to contribute positively and for this to be used to secure planning consent.

7. Ecology

A qualified ecologist is required to carry out an ecology survey to comply with best practice and the British Standard for Biodiversity BS42020. The survey proposed should be proportionate and outcome focused. We do not currently anticipate the presence of any rare or protected species but the ecologist will need to confirm this and propose any mitigation required to make development acceptable.

The following specific points need to be considered:

- The Yew trees on the northern boundary of the Royal Manor should be surveyed and the layout adapted to suit or justify tree works if required
- The small 'wild garden' created by the school at Southwell is **perceived** by locals to offer a haven for wildlife. This needs to be surveyed and a strategy devised to mitigate the impact of development.
- Bat surveys are likely to be required for demolition of the school buildings. We expect the timing of demolition to allow maximum use of vacant building credits. We therefore require advice and the timing of Bat surveys to ensure demolition can proceed as soon as outline approval is granted (expected Oct 2017). Your tender should outline fees for relevant surveys and EPS licence requirements.
- Prior to demolition the ecologist should recommend management measures (of buildings and surrounding amenity areas), to ensure development is not delayed once planning is granted.

8. Highways & Access

A Transport Assessment will be required following consultation with the Highway Authority to determine scope and baseline considerations. The TA should follow best practice and cover the following:

- Review of national and local transport and highway design policy for housing development
- Review of local transport links, highway safety information
- Identification of off-site highway improvements (if any) and s106/s38/s278 highway obligations
- Baseline traffic movements
- Assessment of traffic impact and junction capacity at proposed site access points
- Design of estate roads and car parking strategy (ref. Dorset parking standards)
- Residential Travel Plan

Road and parking layouts need to balance property owners' wish to have parking in-curtilage ('out front') whilst avoiding cars dominating the street scene. The highway input will be led by the design work in order to create well-designed buildings, streets and spaces.

9. FRA

The site is not expected to be at risk of flooding however, your bid should allow for a review of EA flood maps and assessment and reporting on this issue as part of the planning submission.

10. Negotiation of Planning Conditions and post submission matters.

(The consultant will be expected to support the HCA and solicitor but not lead on the negotiation of any s106 agreement.)



8. Tender Assessment Criteria:

The selection of consultants will be made on the following basis:

- 50% quality
- 50% price

The 'quality' elements of the tender submissions will be marked against the following criteria:

- Technical merit of proposal: 20%
- Understanding of project requirements: 20%
- Relevant staff experience: 35%
- Management and communication: 12.5%
- Programme: 12.5%

It acknowledged that bidders are likely to engage sub-consultants. Bidders should clearly set out in their submission the responsibilities of the lead consultant and their sub-consultants including time charging and fees. The client has the right to decline nominated sub-consultants and where appropriate seek clarification of alternative arrangements from bidders.

The HCA reserves the right not to award this contract to any tenderer and not to award to the lowest priced.

9. Proposed Staff:

Please include a one page CV for each consultant to be used on this project, confirm their office location and provide an outline for approximately how much time they will devote to the project (see Tender Response below).

10. Management Arrangements:

Please provide relevant details for the management of the project. This may include health and safety as well as time/personnel management. Please also confirm who will be the main client contact. All draft reports will be reviewed by the HCA and comments returned, which the consultant will be expected to clarify and/or amend.

11. Programme & Project Delivery:

Please include a full programme to deliver the commission clearly indicating individual stages and how stages interrelate with one another. Your programme should be provided either as a gannt chart or by completing/expanding the table below.

Key milestones	Target Completion Date	Weeks from previous milestone
Issue of ITP	w/c 2 Jan 2017	
Submission of OP application		



	Grant of OPP		

12.Tender Responses:

Please limit your tender response as much as possible, but include:

1. Summary of your understanding of the brief/services and your proposed approach (maximum 2 sides of A4 11pt Ariel font)
2. Confirm the project team and project lead and briefly outline relevant skills and experience (maximum two pages plus an appendix including one page CV's in 11pt Ariel font);
3. Management arrangements (maximum one page 11pt Ariel font);
4. Costs broken down by service headings; and
5. Any other pertinent information.

Annexes:

- 1 – Royal Manor School Site boundary plan
- 2 – Southwell Primary School boundary plan
- 3 – Site photographs and location plans
- 4 – Royal Manor School due-diligence phase indicate housing layout
- 5 – Southwell Primary due-diligence phase indicate housing layout
- 6 - Topographical survey specification

Annex 6:

Topographical Survey Specification

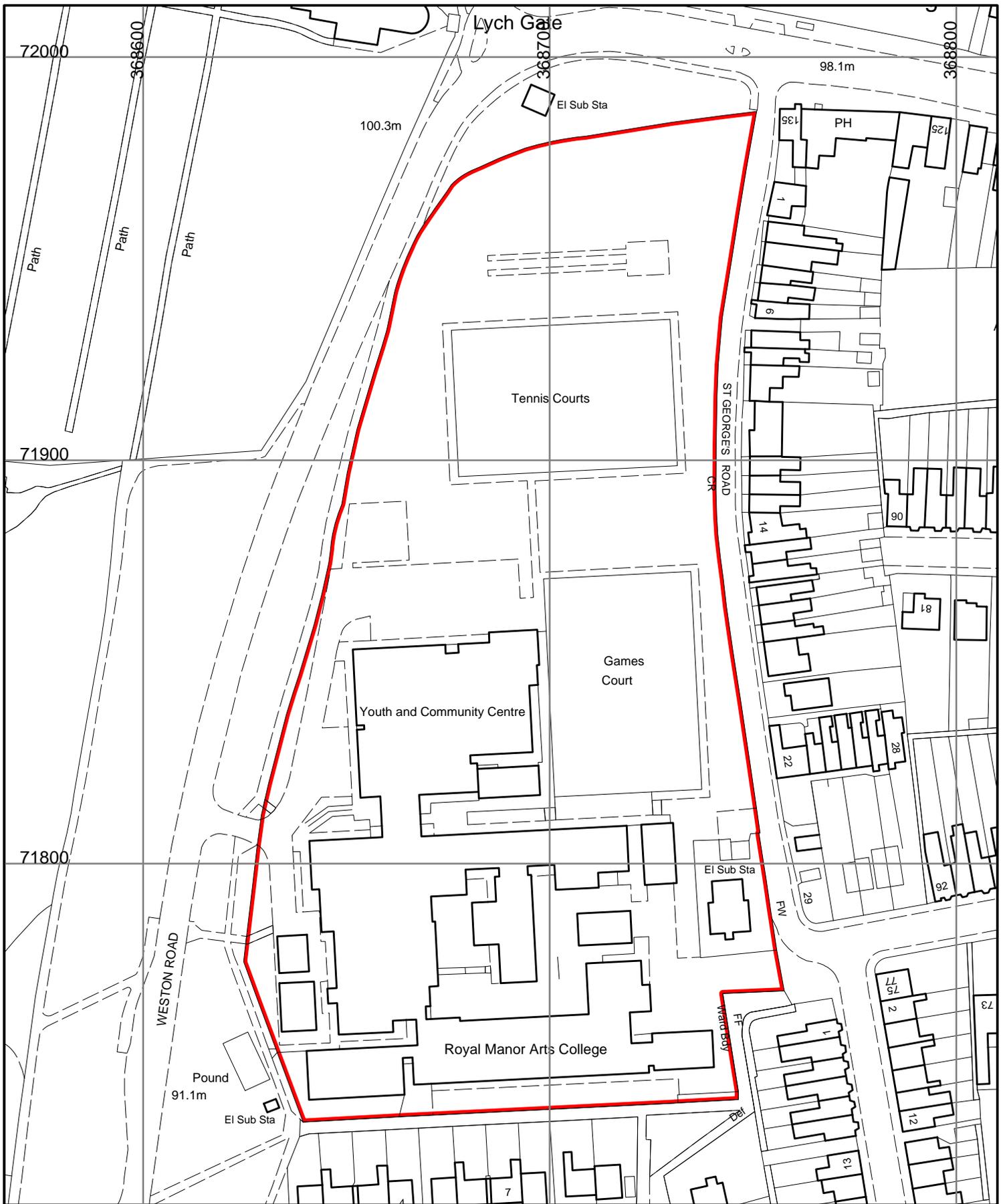
The site limit is defined by the red lines in Annex 1 and 2. Specification includes mapping the following:

- Footprint of building/structures on & immediately adjacent to the site with ridge and eave levels.
- Visible boundary features: walls, fences, hedges, ditches, etc, with height & descriptions.
- Roads, tracks, footways and paths
- Street furniture (if any)
- Statutory Authorities' plant and service covers where visible
- Changes of surface
- Overhead cables/services
- Isolated trees to be shown with position, spread and trunk diameter. Minimum trunk diameter 150mm taken at 1.5m above ground. Indicative heights of trees to be shown.
- Multi-stemmed trees to be shown as one trunk with number of stems indicated.
- Trees on adjacent land within a distance of 15m from the boundary or where their crown overhangs the boundary

- Trees forming groups and areas of woodland will be identified by an external canopy line
- General vegetation limits
- Water features and earth works
- Areas of obscured ground (approximately only – no clearance has been allowed for).
- Levels with a general spacing of 5m/10m related to Ordnance Survey datum.
- Data related to an arbitrary grid OS grid by “best fit” to existing digital data
- Data in 2D and 3D report formats
- Drawings provided by e-mail or web delivery in Autocad DWG and PDF format.

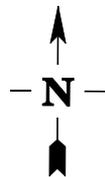
Accuracy

Accuracy of the measured data will be commensurate with 1:200 scale drawings as outlined in the Royal Institution of Chartered Surveyors Publication "Surveys of Land, Buildings & Utility Services at Scales of 1:500 & larger".



TITLE
 Acquisition Plan
 Royal Manor Campus
 Weston Road
 Portland
 Dorset

 Acquisition Boundary - 2.4582Hectare



Homes &
 Communities
 Agency

Spatial and Market
 Intelligence

ITP NO.
 -

PARCEL REF
 NA

DRG NO.
 JXG22339_2

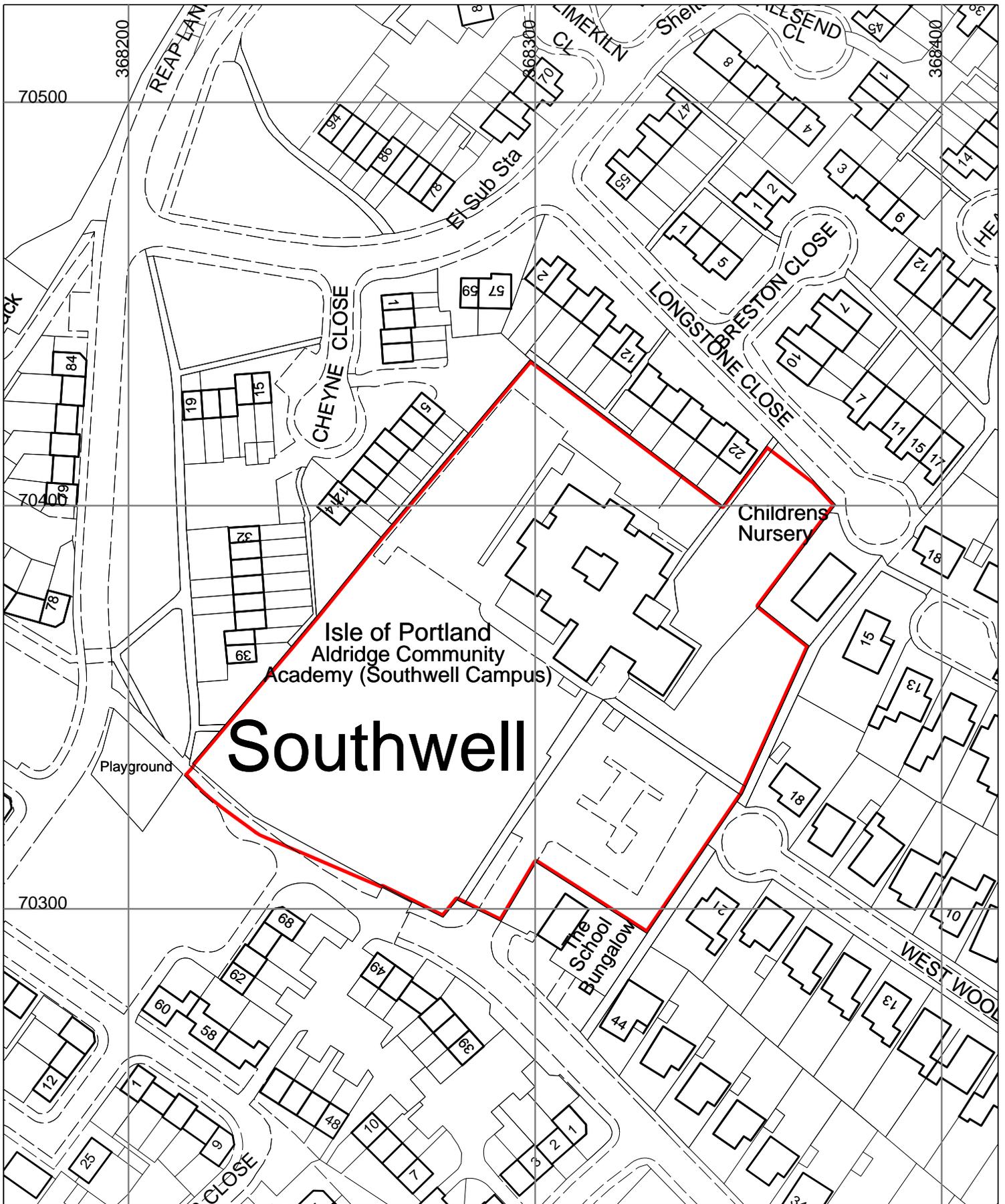
DATE
 26/05/2016

SCALE
 1:1,250

SIZE
 A4

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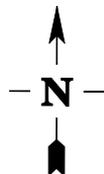
Tel: 0300 1234500
 Email - spatial.intelligence@hca.gsi.gov.uk
www.homesandcommunities.co.uk



TITLE
 Acquisition Plan
 Southwell Campus
 Portland
 Dorset



Acquisition Boundary - 1.3058 Hectare



Homes &
 Communities
 Agency

Spatial and Market
 Intelligence

Tel: 0300 1234500
 Email - spatial.intelligence@hca.gsi.gov.uk
 www.homesandcommunities.co.uk

ITP NO.
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DATE
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 1:1,250

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Annex 1 – Location Plans and site photographs

Fig 1 – Location of Isle of Portland

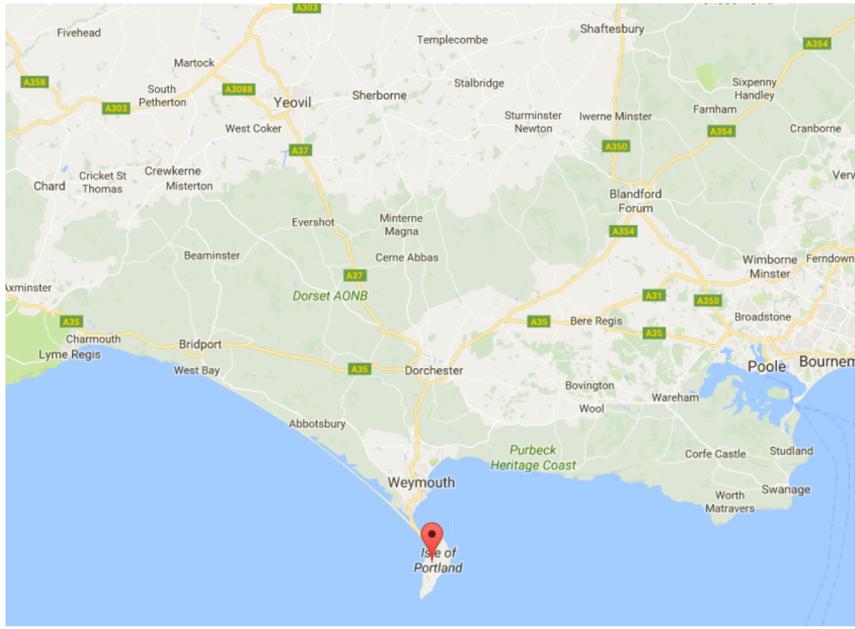


Fig 2 – Location on Portland



Fig 3 – Royal Manor School, Weston Road, Portland

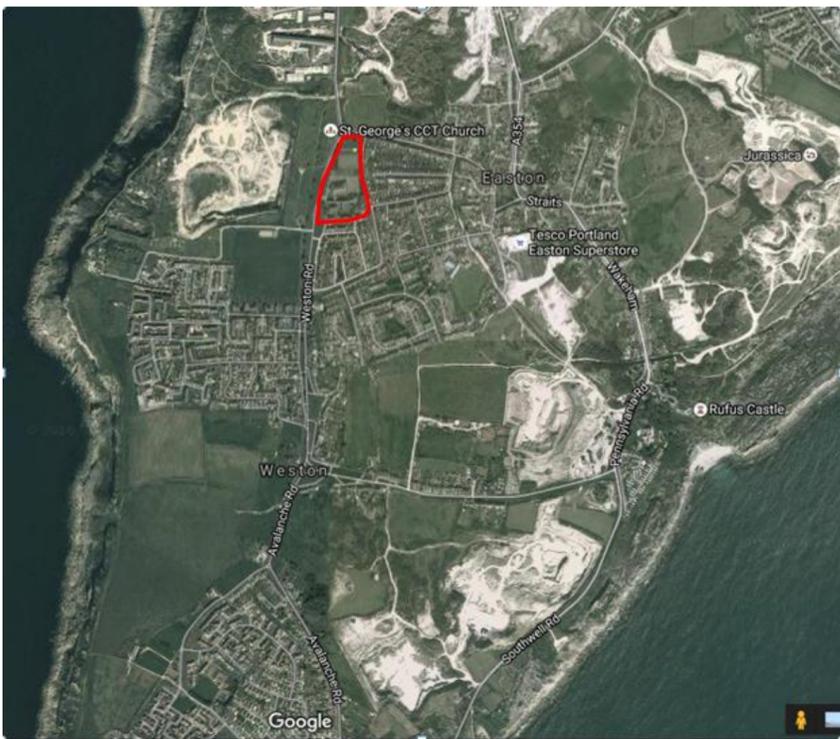


Fig 4 – Sowell Primary school, Sowell, Portland

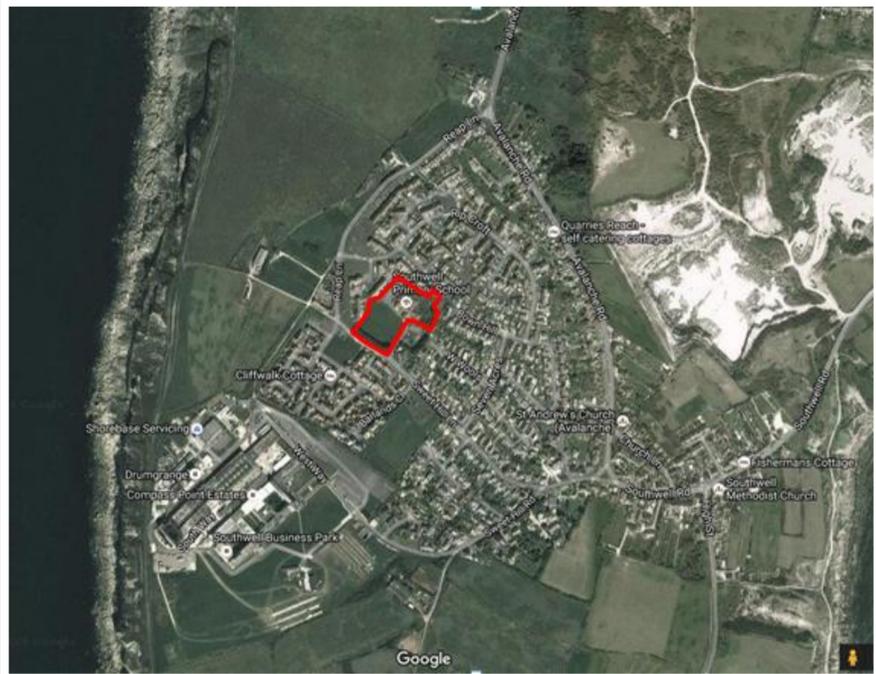


Fig 5 – View east into Royal Manor site from Weston Road



Fig 6 – View north along Weston Road – Royal Manor site to east



Fig 7 – View south along St Georges Road, Royal Manor site behind boundary wall



Fig 8 – View south from Reforne, Royal Manor site behind boundary wall



Fig 9 – View southern elevation (rear of Pound Piece), Royal Manor site



Fig 10 – View Royal Manor school main site entrance



Fig 11 – View across the sports pitches to St Georges Road to the east



Fig 12 – Tophill school in the 1920s



Fig 13 – View west, Royal Manor secondary access from St Georges/Channel View Road



Fig 14 – View south along St Georges Road



Fig 15 – View south along Weston Road



Fig 16 – View north along Weston Road (Pound Piece to right)



Fig 17 – Main entrance to Southwell primary off Sweet Hill Lane



Fig 18 – View west at end of Sweet Hill Lane – Southwell primary behind trees



Fig 19 – Recent Sandholes Close development adjacent to Southwell Primary



Fig 20 – Southwell Primary, pedestrian access from Longstone Close to north



Fig 21 – Northern boundary of Southwell Primary



Fig 22 – Adjacent properties – view west along Sweet Hill Lane





Potential DCC Site acquisitions

Royal Manor College

UD.02

Concept Layout



Key

-  Semi-private space
-  Private garden
-  Public space
-  Designated play space
-  Main access road
-  Pedestrian priority street
-  Potential main access
-  Potential emergency access

Scale @ A3 - 1:1500



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November 2016

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Potential DCC Site acquisitions

Southwell Primary

UD.01

Concept Layout



Key

-  Semi-private space/parking area
-  Private garden
-  Public space
-  Designated play space
-  Pedestrian priority street
-  Potential main access
-  Potential emergency access

Scale @ A3 - 1:1500



A090070-177

November 2016

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