

Chiltern District Council and South Bucks District Council Town Centre Retail and Leisure Study Project Brief and Invitation to Tender

This brief details work to be commissioned to form a Town Centre Retail and Leisure Study ("study") to support a joint Local Plan for Chiltern District and South Bucks District Councils ("the Councils").

Preamble

The Councils are preparing a joint Local Plan to replace the existing Core Strategies and Local Plans for the two districts. An evidence base is required to support new policies and proposals and assess town centre applications. In order to support these projects, a retail and leisure study is required.

The Councils' current evidence is contained within the following documents:

- Chiltern District: Retail and Town Centre Update 2013 (PBA)
- South Bucks District: Retail and Town Centre Study Update 2009 (NLP)
- South Bucks District: A Review of the Local and District Centres within South Bucks 2013 (SBDC)
- Both Districts: Retail and Town Centre Study 2007 (NLP)

These documents are now considered to require updating and, as part of their joint working, the Councils wish to commission new evidence on the need and capacity for key town centre retail and leisure uses. Separate evidence is being prepared on office needs and is outside the scope of this study.

The main requirements of the study to be commissioned are considered below.

Main requirements of study

This project consists of a study into the need and capacity for key town centre retail and leisure uses, covering specified centres within the two districts. This should set out how much development is required, of what type and when. The time period to be covered is the joint Local Plan period (2014 to 2036). The study must be compliant with national policy and must address any relevant points arising from the National Planning Policy Framework (NPPF) and National Planning Practice Guidance.

The required tasks are set out in more detail below.

Centres to be covered:

- Amersham on the Hill
- Beaconsfield
- Chesham
- Chalfont St Peter

- Gerrards Cross

All are classified as district centres under currently adopted policies.

Development Scenarios

Two development scenarios are required, to reflect two possible outcomes from current discussions about housing distribution across Buckinghamshire.

1. Providing full objectively assessed housing need (OAN) across the two districts (15,100 dwellings across the two districts for the plan period). It should be noted that the OAN is currently being updated and so may be subject to change.
2. Providing a portion of the OAN in Aylesbury Vale District. Currently the Councils have an in principle agreement that the emerging Aylesbury Vale Local Plan will provide for 7,000 dwellings of Chiltern and South Bucks' unmet needs, leaving 8,100 dwellings across the two districts for the plan period. This is subject to ongoing Duty to Cooperate discussions and may be subject to change.

Retail Needs and Capacity

Forecasts are required of capacity for convenience and comparison goods in each centre, for each development scenario, for the following years: 2016, 2021, 2026, 2031, 2036.

A new household telephone survey is likely to be required and should determine the primary and secondary catchment areas of the five centres. The resulting catchments are to be mapped.

Planned population growth and changes in spending patterns within the catchments of each centre are to be examined. Population distribution across the districts is not yet available although interim estimates should be available by October 2016. Expenditure growth rates used are to be agreed with the Councils, and should be both conservative and realistic.

The study should examine the implications that electronic and mobile commerce and other special forms of trading are likely to have on future spending patterns.

All assumptions should be made clear in the final report and information leading to conclusions referenced or contained in the report or appendices.

Retail Hierarchy

The consultant should recommend a retail hierarchy for the two districts. This will involve offering a view on the future classification of the five identified centres, in particular whether any should be upgraded to the status of town centres.

The plan's resultant housing distribution may result in the need to review whether additional centre(s) should be identified and added to the five centres to be covered. In particular, a view should be offered as to the preferred future role of Little Chalfont centre. This is currently classified as a local centre but, subject to ongoing plan work, may offer significant development opportunities (for employment and housing) in a sustainable location and may require an enhanced retail offer as a result.

Town Centre Leisure

The demand for built leisure in the form of main town centre uses as defined in the NPPF should be assessed, and compared to available supply to identify any shortfall. If a shortfall is found then a view should be offered as to whether, how and where it should be addressed. This element of the study is likely to be largely qualitative based although quantitative evidence should be used wherever available.

It should be noted that adjoining districts with nearby centres currently fulfil a significant part of the two districts' leisure needs. This applies in particular to larger leisure uses such as cinemas. A view should be offered as to whether this is a pragmatic method of provision or whether a greater part of local leisure needs should be provided for within the two districts. If a leisure need is identified then the Councils will also require advice on likely delivery taking into account market attractiveness and competitiveness of centres compared to other nearby centres.

Town Centre Healthchecks

The Councils may wish to commission town centre healthchecks as part of this commission, provided it would not divert resources and attention from the main focus of the study and is affordable. This task would encompass examining the health of each centre, including a SWOT analysis, and include an assessment of the current and likely future role of each centre and the sustainability of their key shopping areas.

The consultant should specify and price this element of work separately and, importantly, identify the impact of its inclusion on the overall project timetable. The Councils make no undertaking to commission this element of the work.

Other Requirements

Aside from the requirements listed above, the Councils may require the consultant to provide support at Examination in Public of the Local Plan. This may include preparation and research as well as attendance at the examination to explain and defend the study. The need for such additional work is not guaranteed and the Councils make no undertaking to commission such extra work. Accordingly this element of the work should be separately specified and priced in the fee proposal.

Deliverables

The consultant will provide regular progress updates to the Councils while the project is under way. These updates may include e-mail, telephone or physical meetings, as agreed with the Councils.

The consultant will deliver to the Councils by an agreed date a draft study in electronic form. The Councils will provide comments and the consultant will amend the study as necessary. The consultant will then deliver to the Councils by a further agreed date a final study in

electronic form. In each case the study is to be supplied in PDF and Word format, with all mapping data made available as GIS shapefiles compatible with the Councils' systems (ArcGIS). The Councils will publish the final reports on their websites as part of their local plan evidence base.

Bid

In submitting a bid the consultant should include the following:

- a) An overview of how the brief would be approached / methodology.
- b) Consultancy experience and ability to successfully deliver this brief.
- c) Names and professional background of those who will be undertaking this work including relevant experience (e.g. CVs).
- d) Confirmation that if awarded the contract for this work that there is or will be during the life of the contract no conflict of interest (actual or perceived).
- e) The expectations and requirements on the Councils to successfully deliver the brief to the agreed timetable.

Quotations must be received in the form of formal sealed written quotations. They must be submitted in a plain, sealed envelope with only the following on it:

- The name of the Contract Owner (Graham Winwright).
- The Councils' address (Planning Policy, Chiltern District Council, King George V House, King George V Road, Amersham, Buckinghamshire, HP6 5AW).
- The title of the contract (Town Centre Retail and Leisure Study).
- The word "Quote" or "Tender"

Quotations must be received by 16.30 on Friday 9 September 2016.

Timetable

An indicative project timetable is shown below. The actual project timetable is to be agreed between the consultant and the Councils. Quotations should indicate whether the indicative timetable is feasible and, if not, suggest alternatives.

- By 9 September 2016 (16:30): Sealed written quotations to Councils
- w/c 12 September 2016: Interviews in Amersham
- By 16 September 2016: Appoint consultant
- September – November 2016: Consultant to research and draft study
- 5 December 2016: Draft study to Councils [KEY MILESTONE]
- By 16 December 2016: Councils provide feedback on draft study
- December 2016 – January 2017: Consultant revises draft study
- 23 January 2017: Final study to Councils
- February 2017: Consultation with Council members and officers
- March 2017: Councils provide final sign-off of study
- March 2017: Consultant to invoice for project fee

Fees

A fee proposal is sought for the work specified in this brief. This proposal should be exclusive of VAT and contain the following four elements. These elements should be individually priced and include any associated costs of data acquisition and other relevant expenses:

1. Production of a town centre retail and leisure study (fixed fee).
2. Town centre healthchecks for the specified centres (fixed fee but optional for the Councils).
3. A presentation to explain the study to members and officers of the Councils (fixed fee, if required by the Councils).
4. A price for possible future work to support the Councils at Examination in Public of the joint Local Plan (either an overall fixed fee or a capped hourly rate).

The fee proposal is to be confirmed by the Councils with a purchase order at the start of the project. The lead client for the project will be Chiltern District Council, to whom all invoices and other correspondence should be addressed. The lead contact for the Councils will be Phillip Gill: phillip.gill@southbucks.gov.uk / 01494 732951.

The consultant may submit an invoice for an interim payment of 50% of the project fee following receipt of the draft study by the Councils. An invoice for the remaining 50% of the project fee may be submitted following approval of the final study by the Councils. No payments will be made unless the relevant invoices have been received from the consultant.