Scope of Works

East Midlands HS2 Growth Strategy: Hub Station (Toton) Growth Zone

**Delivery Vehicle Route Map**

**Quotes to be returned by Wednesday 15 November 2017, 11 am**

**Toton Hub Delivery Vehicle - High level review of positioning & governance**

1. **The client sponsor**

D2N2 Local Enterprise Partnership (Accountable Body Derbyshire CC – HS2 Account)).

1. **Context**

The client team are working closely with key local stakeholders including the Local Authority Leaders and senior officers, from both upper and lower tier authorities in the area, to explore the possible formation of delivery vehicle to take forward the East Midlands HS2 Growth Strategy (published October 2017).

The Partnership has agreed to establish a dedicated HS2 delivery vehicle team and need to establish a clear route map towards putting in place with an effective team and accountable decision making body to progress the plans and investment in the area. This should provide confidence to government and wider stakeholders.

Led by D2N2 LEP, and EMC and interim Exec team through an HS2 Programme Board have under taken and completed a significant number of studies to get to this stage including a development framework and indicative masterplan (BDP & Jacobs); Development Infrastructure Funding Study (PBA); Funding & Delivery Mechanisms Study including an Financial/Value Capture Model (GVA) and outline Business Case (Amion).

These studies have helped to inform the Growth Strategy itself that was launched in October <http://www.emcouncils.gov.uk/Press-releases/thousands-of-jobs-and-almost-4billion-for-economy-detailed-in-hs2-strategy>. Many remain work in progress and/or contain commercially sensitive information. As such they remain confidential.

1. **Aim of the Commission**

*To provide a clear route map for local stakeholders to establish an appropriate team and delivery body (By April 2018) to drive forward the implementation of the Growth Strategy ambitions for the Toton Hub Station Growth Zone in context of the wider East Midlands Hs2 Growth Strategy .*

1. **The area focus**

Toton in Broxtowe Borough, Nottinghamshire is the confirmed location for the HS2 East Midlands Hub Station. The Growth Strategy highlights the development potential of the station area as an Innovation Campus at the Heart of Network of Garden Villages. The scope extends to include a former iron works in Stanton, within Erewash Borough, Derbyshire. The area excludes Chesterfield and Staveley which although featuring in the Growth Strategy will be subject to separate delivery arrangements.

1. **Issues to address**
* Multiple authorities and agencies engaged
* Managing different expectations of stakeholders
* Existing Delivery Board transferring to new model
1. **The output**

This will be an independent study undertaken by an appropriately qualified team of experts in governance, programme management and regeneration delivery, who are able to make an informed assessment.

The study will deliver the following outputs:

* A *‘delivery vehicle evaluation’* building on the work already undertaken presenting a clear preferred solution;
* Clear recommendations on governance and considerations including powers, accountable body/financial and legals;
* Recommendations on the establishment of appropriate team/teams to deliver the ambitions outlined in the HS2 Growth Strategy relating to the Toton Hub Station growth zone - confirm resource plan (people and financial); and
* Key Steps and a Phased Programme for implementation by April 2018

The report will provide sufficient clarity and guidance to enable the partners to put in place the architecture for (a phased) implementation.

1. **Sources of Information**
* Growth Strategy and supporting reports/paper mentioned above;
* Desktop research, relevant information and analysis;
* Experience and best practice;
* Focussed interviews with key stakeholders and sector experts including:
	1. Consultants engaged by the client team to formulate the strategy and evidence base (the client tem to facilitate a workshop);
	2. Local Authority Leaders and Place Directors
	3. East Midlands Councils
	4. D2N2 LEP
	5. HS2 Ltd
	6. LCR/Hs2GP
	7. HCA
	8. DCLG/BEIS
	9. Chamber of Commerce

The above In addition to regular engagement and feedback with the client sponsor team.

See appendices for various background documents.

1. **The budget shall be between £20,000 up to a maximum of £25,000 for the duration of the project. Bids exceeding the maximum budget will be deemed non-compliant.**
2. **Deadline:**
* **Final document by 29 December 2017**
* **The successful bidder will be required to present their findings**

However, the contract may be extended by up to 6 months during the formation of any delivery bodies affiliated to the Growth Strategy. In relation to Toton this is envisaged to be April 2018. Any scope of work beyond December is to be determined.

1. **Appendices**
2. **Submission Requirements & Evaluation**
3. **Background Documents**
4. East Midlands HS2 Growth Strategy - World Class: Locally Driven.
5. GVA/Amion – Funding & Delivery Mechanisms Study & Outline Business Case\*
6. PBA – Development Infrastructure Funding Study\*
7. BDP/Jacobs – Development Framework & Indicative Masterplan
8. Working Draft Project Initiative Document (PiD) and resource plan
9. Summary Note/Cost Plan

\*at time of writing these documents are still being finalised.

***To request background documents please email***: kharrison@hs2gp.co.uk

APPENDIX 1

1. **Submission Requirements & Evaluation**

The Client requires the Bidder to provide the following:

1. **Method Statement**

Reflecting on the brief and demonstrating experience gained in other similar projects, please provide a method statement outlining:

* your approach to the work outlined in the brief including:
	+ understanding the relevant baseline conditions through a ‘delivery vehicle evaluation’ building on the work already undertaken and presenting a clear preferred solution;
	+ clear recommendations on governance and considerations including powers, accountable body/ financial and legals;
	+ recommendations on the establishment of appropriate team/teams to deliver the ambitions outlined in the Hs2 Growth Strategy relating to the Toton Hub Stantion;
	+ Key steps and a phased programme for implementation to April 2018
* any other matters you believe are raised by the brief and not covered above
1. **Programme**

Set out the key processes, milestones and deliverables you believe are required in setting out an outline programme for the completion of the task within the time available.

Also provide an illustrative timeline with key milestones and deliverables to establish a delivery body between now and April 2018.

1. **Consultation**

Intense engagement with client and key stakeholders will be critical and you should set out a clear approach to this including a series of focussed interviews outlined in section 7 of the accompanying brief. This should include your approach to meetings, workshops and presentations to the client, other stakeholders and communities.

1. **Project Team**

Set out the team you intend to use on the project and a resourcing schedule, including project leads, day to day contacts, specialists and sub-consultants, providing short CV’s and recent experience for the individuals. Please include time allocations and costs against each member of the team.

1. **Project Management**

Provide proposals to ensure the effective resourcing and management of the project and how you will ensure the high-quality outcomes are delivered to programme. Please confirm that you will be able to meet the timescales and deliverables as set out by the client.

1. **Interview**

Please confirm the availability of the proposed Project team to attend an interview with the Client when requested. It is expected that the key proposed project team members named in the submission attend the interview. This will include the proposed project leads from the organisations named in the submission and the key day to day contacts. Although not forming part of the submission requirements, 15% of the above quality assessment of your submission will be based on this interview following the second stage of the procurement process (see following section 8 for details).

1. **Fee Quote**

Please provide a fixed fee for the proposed work, including all associated costs, along with a schedule of fees for any further work not set out in the brief or your quote.

1. **Scoring Criteria**

Submissions will be evaluated against a specific evaluation framework. The evaluation will be weighted overall 70% against quality and 30% against price. The table below provides a more detailed breakdown.

|  |  |  |
| --- | --- | --- |
|  | **Criteria** | **Weighting** |
| Quality | a) Method Statement  | 25% |
| b) Programme  | 5% |
| c) Consultation  | 10% |
| d) Project Team  | 10% |
| e) Project Management  | 5% |
| f) Interview  | 15% |
| Price | g) Fee Quote | 30% |

1. **Quality**

Evaluation of the quality part of the tender (a-f) will take place with bidders being assessed and marked, in whole percentage points, out of those available for each section. The following scoring table will be used to assess the quality sections of the bid:

| **Score Value** | **Criteria** |
| --- | --- |
| 0 | **Unacceptable** – no evidence provided |
| 1 | **Unsatisfactory** – significant weaknesses and failure to address requirement or a misalignment between proposed approach and resources |
| 2 | **Less than satisfactory** – meets most requirements but with a significant shortcoming, e.g. in terms of approach or resources |
| 3 | **Satisfactory** - Satisfies the project quality requirements – note that this is not similar to ‘adequate’ or ‘mediocre’ but that the requirements have been met and the resources align  with the approach and undertakings |
| 4 | **Better than Satisfactory** - more than meets the quality requirement through significant additional input in terms of resources approach or standards to be achieved |
| 5 | **Excellent –** considerably exceeds the minimum requirements in terms of approach, resources and/or outcomes to be delivered |

1. **Interview**

The interview section of the quality assessment will also be considered against the scoring table above. Bidders will be asked to give a presentation on their approach to the project, covering the key quality areas (a-e). Bidders will be assessed on the following basis:

1. Awareness and understanding of the project (20%)
2. Methodology - Approach and process proposed (20%)
3. Ability to explain complex issues and design concepts coherently (20%)
4. Presentation skills, use of material, visual aids and coherence (20%)
5. Response to client panel questions (20%)

***Interview Date***

Interviews shall be held week commencing 20 November 2017.

***Location***

D2N2 Offices, Commerce House, 8 Experian Way, ng2 Business Park, Nottingham, NG2 1EP

1. **Price**

The price section of the bid will be marked out of 30% points. The tender with the lowest price will be awarded 30% points. Tenders score will be assessed as follows: Benchmark Price (Lowest compliant bid) / Tender Price X 100 X 30% points = Tender Score

e.g. £20,000 is the lowest tender price, your tender price is £25,000. You would receive 24%