

<b>Invitation to participate in a mini competition</b>	
<b>Panel Name:</b> Multidisciplinary Panel	
<b>Project Name:</b> Stone Row Head, Lancaster	<b>Date:</b> 6 <sup>th</sup> October 2016
<b>Reference Number:</b> 28702	
<b>To:</b> <i>Name of Consultant (taken from ITP)</i> <i>Address of Consultant (taken from ITP)</i>	
<b>From:</b> [REDACTED], Senior Development Manager	

## 1. Summary

The HCA is seeking to appoint a multi-disciplinary consultant to procure a series of due diligence surveys to support a planning brief for a site at Lancaster known as Stone Row Head.

The HCA have acquired the site from the Ministry of Justice as part of the current programme to dispose of surplus Government assets for housing. It is considered that the site would make a suitable and attractive site for new housing. Lancaster City Council are supportive of this view.

This is a relatively small site (site area approx. 0.9 ha) but it is estimated that it could have capacity for 14 new dwellings, including conversion of retained farm buildings.

The HCA have a requirement to dispose of the site within the current financial year. Due to this timescale it will not be possible to submit an outline planning application. Disposal of the site is likely to be by open tender, on freehold basis and will be unconditional on planning permission.

The HCA therefore intend to produce a Planning Brief for the site in collaboration with Lancaster City Council, in order to clarify the current planning position and requirements for the site. This Brief will be prepared by the HCA but it is to be accompanied by as comprehensive a set of surveys as can be prepared in the current time period. This will provide additional information and reduce risk to developers bidding on the site on an unconditional basis.

A series of previous surveys are already available and are made available with this brief for information. These provide a body of information about the site and the HCA are now seeking to add to this with further surveys. We therefore seek quotes for the survey information set out below, as part of the due diligence exercise to accompany the site disposal.

## 2. Objectives

The objective is to procure several specific surveys (see 5. Scope of Work) to provide the fullest possible picture of the site constraints and capacity to be obtained within the timescale available. These will allow potential risks to be evaluated and assessed in a consistent manner and provide a shared basis of understanding on which financial bids will be based. The surveys will inform the Planning Brief which will establish, in collaboration with Lancaster City Council, a policy-compliant form of development for the site which must also be viable and deliverable. The surveys should be commensurate in extent and detail with these objectives.

Collateral warranties should be provided, and which should be transferrable to the purchaser, in accordance with the Multi-Disciplinary Framework Contract.

The HCA's overall objectives are to transfer the site by the end of the current financial year (end of March 2017); to make the most effective contribution to local housing delivery; and to seek the most financially advantageous offer for the site.

### 3. Site and Surroundings

The site is located to the east of Lancaster and comprises the land and buildings associated with Stone Row Head Farm. The site was formerly used as a training farm for the adjacent Young Offenders Institute (now HMP Lancaster Farms, a Category C adult prison). This use has now ceased and the site is now vacant. The site is bounded by woodland to the east and north-east, farmland to the north-west and west and a cemetery to the south.

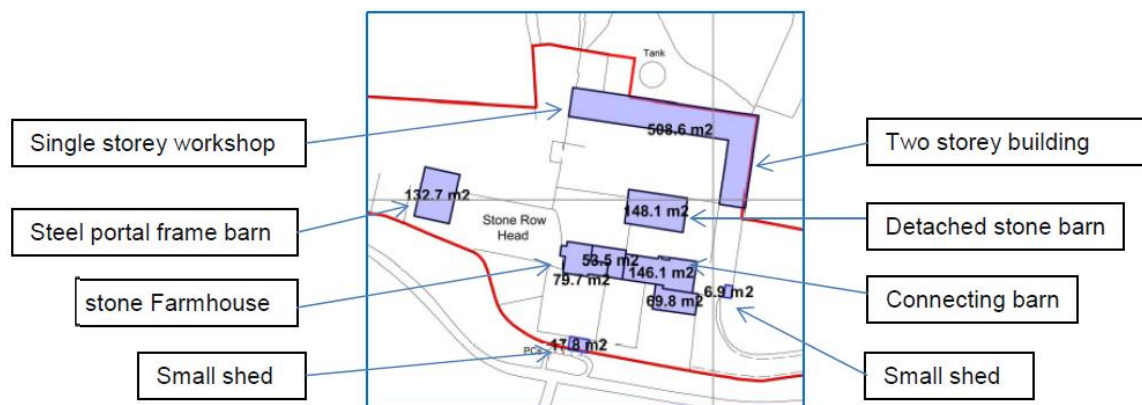
The site is located within a woodland setting on a prominent position in the surrounding landscape. It is currently proposed by the HCA that most of the buildings are to be demolished to enable development, but that the farmhouse be retained and converted for residential use, in line with advice from the local planning authority due to its heritage value.

The farmhouse and attached barn are intended for local listing by Lancaster City Council Conservation Team, but currently the buildings carry no listing designation. The detached barn may also be included in the listing. Notwithstanding this, the council confirm that any future planning application would need to take into consideration the buildings as locally listed.

There are a number of trees and tree groups on site which are included under a Tree Preservation Order, and their retention is likely to be required as part of the future development.



*Photographs of the site*



*Buildings on site*

### 4. Existing Survey Information

The following surveys and reports have been already undertaken and are provided with this brief for

further information.

**Ecological Assessment (TEP)** – a desktop study and Phase 1 Habitat Survey was undertaken in September 2016. This summarised the following conclusions:

- **Designations** - There are no designated wildlife sites on the site or within influencing distance.
- **Habitats** - There are deciduous and broadleaved woodland habitats to the east and west of the site; the report makes recommendations to protect these features.
- **Amphibians** – there are no implications for development regarding Great Crested Newts.
- **Bats** - there are several buildings and trees on site that have bat roost potential. TEP have been commissioned separately to undertake further bat building tree inspections. Trees of Moderate / High potential and buildings of Low - High potential will require further nocturnal bat surveys, across the period of May to August inclusive, to determine whether a roost is present on site.
- **Badger** – no evidence of badger was noted on site and no badger records were returned within 1 km of the site. A pre-commencement survey will be required prior to site development to confirm absence of badger.
- **Reptiles** – there are unlikely to be sufficient amphibian populations locally to support grass snake
- **Water vole and otter** – there are no suitable habitats for water voles and otters.
- **Invertebrates** – there are no constraints on development with regards to invertebrates.
- **Birds** – there is evidence of pellets in Building 1, possibly from barn owl. Barn owl surveys are recommended, to be conducted between April and September by an ecologist holding a barn owl licence.
- **Bird nesting** – vegetation should be cleared outside of the bird nesting season (March to August inclusive).
- **Invasive species** – rhododendron and montbretia are present on site. A method statement to eradicate these non-native species will be required prior to development of the site.

**Asbestos Management Survey (WYG)** – an Asbestos Survey and Management Plan for the Farmhouse, and soil heap sampling, was undertaken in September 2015. The report confirms the presence of asbestos in building materials including bitumen roof felt, cement panels, floor tiles, ceilings and roof sheets, and in electric cupboards. The Asbestos Management Plan specifies that these items are to be removed prior to any demolition or refurbishment works commencing.

**Environment and Flood Desktop Report (Argyll)** – this desktop assessment summarised the following:

- Contaminated Land: no significant contaminant linkage has been identified. Accordingly soil and groundwater liabilities are unlikely to occur. The planned redevelopment is likely to require further investigation to satisfy planning conditions. Considering the information currently available, Argyll consider that such investigations (and remediation, if required) are unlikely to result in sufficient cost to render the scheme unviable.
- Environmental Hazards : The following have been identified in the immediate vicinity of the site:  
Infilled Land.
- Flood Risk : Low - The site is not considered to be at a significant risk of flooding.

**Other documents** – the following documents are also included with the brief:

- TPO Plan
- Drainage and Water search
- Groundwise search results
- Highways Paper by Sitesolutions – showing extent of adopted roads ProW etc

The following documents are also available and will be provided to the successful bidder:

- Title Plan

- OS digital mapping data will be made available to successful bidder.

## 5. Scope of Work

The HCA now wish to procure the following surveys as a single combined commission. Invitations have been made to **four** members of the Multi-Disciplinary Consultants Framework from which we will seek a single successful bidder. Our preference is for a single multi-disciplinary company to undertake all surveys, however use of sub-consultants is permitted, provided this is clearly outlined within the tender response. The Framework member must act as a project co-ordinator and as a single point of contact for invoicing and payment.

The following surveys are required.

**Topographical survey** - of the site extent (within the red line of the Location Plan) to include contours, tree positions, buildings (external only), areas of hardstanding.

**Building condition and structural survey** – of farmhouse and attached barn only. This should be commensurate in detail to serve the study objectives, i.e. to inform the viability and suitability of undertaking necessary repairs and converting the buildings to modern residential accommodation. A separate confidential appendix should be provided with indicative costs for necessary repairs. This will be used to assess the viability of retaining and converting the buildings; and to inform the tender evaluations at disposal stage.

**Heritage appraisal** - of farmhouse and barn, to assess and describe the significance of these heritage assets and identify specific features of significance (internal and external) that should be retained if possible.

**Tree Survey** – of all trees on site and whose root zones are within the site. This should assess all individual trees and groups of larger clusters, assessing each by Category. A plan should be provided showing tree locations and root protection areas.

**Ground Conditions** - Phase 1 report (desktop only), including a site visit to inspect rubble piles.

**Archaeology** - An Archaeological Desk Based Assessment (DBA) to identify what, if any, potential archaeological issues within the site may be present. The DBA should involve a search of the main relevant records from the Lancashire Historic Environment Records (HER), National Monuments Records (NMR) and the Lancaster library and Museum Records.

**Utilities** – utility searches have been undertaken and the results are included with this brief. We are now seeking an assessment of existing capacity (for electricity, water mains, foul and surface water drainage and gas) and an informed estimate of relevant connection costs. This should be informed by engagement with the relevant utility providers.

It should be noted that no further ecology surveys are being requested. This is because the remaining recommended surveys have seasonal requirements that are beyond the timescale of the site disposal.

Individual reports are required for each of the above. A summary report is not required.

## 6. Timescale

The timescale for appointment and completion of the work is as follows. Consultants will be expected to comply with this timescale.

- Brief Issued: Thursday 6<sup>th</sup> October 2016
- Tender Return: Thursday 20<sup>th</sup> October 2016
- Appointment of consultant: Monday 24<sup>th</sup> October 2016
- Submission of Draft Surveys: Friday 18<sup>th</sup> November 2016
- Submission of Final Surveys: Friday 25<sup>th</sup> November 2016

## 7. Response to ITT & Evaluation Criteria

In responding to this brief the only information that should be considered is contained within this document or otherwise communicated in writing to Panel Members. Panel Members are asked to prepare their response based on the requirements set out in the scope (Section 5), timescale (Section 6), the evaluation criteria (this Section) and the proforma (attached to this brief). Responses should be up to 6 A4 pages plus CV's with illustrations where appropriate. The submissions will be evaluated on a **30% quality / 70% price** matrix. No interviews are proposed as part of the selection process.

Within the mini tender return it is expected that the consultant shall propose a method statement of how they intend to deliver the commission, including reasonable assumptions on the scope and specification of surveys, and highlight any other relevant issues likely to affect the site. Emphasis will be placed on Panel Consultant's ability to demonstrate relevant experience of similar instructions. CV's for all proposed staff will be required, with a maximum one sheet of A4 per person. The use of sub-consultants must be clearly identified. Bids will be assessed on the criteria set out within the proforma below. Any other relevant work which you consider may be required in addition to what is specified within this brief should also be identified and costed.

The fee quoted should be exclusive of VAT and all expenses, travel costs and disbursements should be separately identified. Standard charges for third party data provision (e.g. from utility companies, historic environment record or similar) should be separately itemised.

The HCA reserves the right not to award this contract and does not have to award to the lowest bidder, since the tender will be assessed on a 30/70 quality/price basis. In addition, the HCA reserves the right to procure only some of the services requested.

Bidders should submit:

- A fee proposal for the above elements (sub-consultants may be used to cover all elements) using agreed HCA rates and showing staff and time inputs
- CVs of all key staff showing relevant experience (max 1 side A4 for each)
- Confirmation of scope and timescale and brief outline of method (max 2 sides)
- Programme

Tenders should be returned by email to [REDACTED] by 5.00pm on **Thursday 20 October 2016**. Tenders should be submitted as a single pdf file no larger than 10 Mb.

Tenders received after this time/date will not be included in this mini-competition. Responses should be sent via the method detailed in this section. Responses received any other way will not be included.

If you require further information concerning the tender process please in the first instance put your query in writing / email to [REDACTED]

## Appendices

- 5740\_ACQ Site Location Plan
- NFW18603-5740 Buildings Plan
- Ecological Assessment
- Asbestos Management Survey Report
- Asbestos Management Plan
- Spoil Heap Sampling
- Environment and Flood Desktop Report
- 150326 TPO Plan
- Drainage and Water search results
- Groundwise search results
- Highways Paper by Argyll – showing extent of adopted roads ProW etc

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<b>To:</b> HCA Project Manager	
<b>From:</b> Name of Consultant (taken from ITP) Address of Consultant (taken from ITP)	
<b>Experience (10 marks)</b> <ul style="list-style-type: none"> <li>○ Relevant experience of similar survey and study scopes</li> <li>○ Relevant experience of similar sites</li> </ul>	
<b>Technical merit of proposal (5 marks)</b> <ul style="list-style-type: none"> <li>○ Suitable method and approach</li> <li>○ Understanding of site-specific issues likely to affect surveys</li> <li>○ Completeness of services offered</li> </ul>	
<b>Staff and other resources (2 marks)</b> <ul style="list-style-type: none"> <li>○ Identification of Project Director &amp; suitability</li> <li>○ Appropriate range of skills set across team</li> <li>○ Allocation of key staff to meet objectives &amp; time allocation weighting</li> </ul>	
<b>Management and communication (3 marks)</b> <ul style="list-style-type: none"> <li>○ Project management structures</li> <li>○ Means of communicating with the client</li> <li>○ Existing relationships with relevant partners which may assist commission</li> </ul>	
<b>Programme (10 marks)</b> <ul style="list-style-type: none"> <li>○ Ability to meet stated deadline</li> <li>○ Sensible periods of time proposed</li> <li>○ Speed of delivery</li> <li>○ Appropriate time for client approval and sign</li> </ul>	
<b>Price (70 marks)</b>	