Request for quote for:

HDC202502 - New Hart Local Plan: Project Planning Support

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| --- | --- |
| Date opportunity posted | 7 March 2024 |
| Last date for clarifications | 21 March 2024 - 10:00AM |
| Quotation return date | 7 April 2024 - 10:00AM |
| Quotation shall be returned to | [procurement@hart.gov.uk](mailto:procurement@hart.gov.uk) |
| With the subject line | HDC202502 - Local Plan Project Planning |
| Contact in case of queries | [planning.policy@hart.gov.uk](mailto:planning.policy@hart.gov.uk) |

# **Introduction**

* 1. The Council invites quotations for this opportunity in accordance with the terms and requirements of this document and any Schedules attached.
  2. Document contents:

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# **Specification**

* 1. **Key contract dates**:

|  |  |
| --- | --- |
| Intended Start Date | Mid-April 2025 |
| Duration | 2 to 3 months estimate |
| Intended End Date | June/July 2025 |

* 1. **Aims and objectives**
     1. Ahead of preparing a new local plan for Hart, the Council is seeking a consultant to deliver a Project Initiation Document and a Project and Resourcing Plan.
     2. The task is for the consultant to produce the PID and Project and Resourcing Plan, informed by discussions with Council staff; primarily the Planning Policy team and the Executive Director for Place.
     3. These documents will put the Council on a robust project management footing for the local plan process. They will inform a realistic local plan timetable and identify the additional resources required (staff, consultancy, budget).
     4. The consultant will bring project planning and project management expertise and a thorough knowledge of the local plan-making process. Informed by discussions with the Council they will be able to identify the resources needed to deliver a new local plan.
     5. Whilst this is a stand-alone commission it may be extended into ongoing project management support. Consultants are asked to suggest what such support would look like (what form that might take) and the associated fees expressed as daily rates.
  2. **Background**

*Local Plan review and five-year housing land supply*

* + 1. Hart District Council’s local plan currently comprises the [Hart Local Plan (Strategy and Sites) 2032](https://www.hart.gov.uk/sites/default/files/2024-08/Hart-Local-Plan-strategy-and-Sites-2032.pdf) (HLP32) adopted in April 2020, and some [Saved policies from the Hart Local Plan (Replacement) 1996-2006](https://www.hart.gov.uk/sites/default/files/2023-07/Hart-Local-Plan-Replacement%29-1996-to-2006-saved-policies.pdf) adopted in 2002.
    2. Following a review of the local plan (to assess whether policies needed updating) Cabinet decided in January 2025 that work should start on a new local plan (see item 68 of [Cabinet agenda](https://hart.moderngov.co.uk/ieListDocuments.aspx?CId=187&MId=653&Ver=4)). This is to be a full local plan which, in combination with the proposed national development management policies, will replace all existing local plan policies.
    3. The urgency around a new local plan has been heightened in light of new Local Housing Need numbers (750 homes per annum for Hart). Had the Local Housing Need figure not been increased, projections indicated that the Council would have had a five-year housing land supply until the end of the plan period. However, the 750 per annum LHN figure will render Hart’s current local plan housing requirement of 423 homes per annum out of date on 1st May 2025, 5 years after adoption. Consequently, the Council will lose its five-year housing land supply on 1st May 2025. Knowing that this situation will arise soon, the Council is already applying the tilted balance for housing developments in case they go to appeal (see Item 54 [Development Management Committee January 2025](https://hart.moderngov.co.uk/ieListDocuments.aspx?CId=140&MId=693&Ver=4)).
    4. It therefore important that work starts on a new local plan as soon as possible, and that a sound project management approach is adopted to ensure an efficient and expedient plan-making process.

*Changing national planning policy context*

* + 1. The next local plan will be prepared in the context of an evolving policy and legislative framework. This includes the new, faster local plan-making process introduced through the Levelling-Up and Regeneration Bill with the details expected in summer/autumn 2025. We wish to proceed as quickly as possible in advance of the new system, to ‘hit the ground running’ once secondary legislation is in place.
    2. The Government has published its [response to the consultation on implementing proposed plan-making reforms](https://www.gov.uk/government/consultations/plan-making-reforms-consultation-on-implementation/outcome/government-response-to-the-proposed-plan-making-reforms-consultation-on-implementation) and consultants should take this into account in their submissions.
    3. We wish to proceed as quickly as possible in advance of the new system, to ‘hit the ground running’ once secondary legislation is in place.
    4. Another key aspect is that we expect to see national development management policies (NDMPs) published this year which will reduce the scope of the local plan. The NPPF will be revised again to avoid duplication with the NDMPs.

*Devolution and Local Government Re-organisation*

* + 1. The decision to start a new local plan has been made in the context of a Hampshire/Portsmouth/Southampton/Isle of Wight Devolution agreement, and Local Government Re-organisation (LGR) to be delivered over the next 3 years.
    2. Devolution will mean a Spatial Development Strategy will be prepared for the new Combined Authority covering Hampshire, Portsmouth, Southampton and the Isle of Wight. This is expected to be completed by the end of the current Parliamentary term.
    3. Under LGR Hart as a district will be subsumed within a new Unitary Authority likely to combine Hart, Basingstoke & Deane and Rushmoor potentially with some other adjoining areas. By 21st March 2025 initial proposals for the structure of Local Government in Hampshire needs to be submitted to Government. By 31st July 2025 the Government will announce decisions on the initial proposals. The Final Proposals need to be submitted by 26th September 2025.
    4. Despite these changes the Council is keen that a local plan is progressed in the interests of Hart’s residents and the future planning of the area.

*Neighbouring authorities*

* + 1. Hart has boundaries with authorities in Hampshire, Surrey and Berkshire all at different stages of plan-making. Both Rushmoor to Hart’s west, and Basingstoke to Hart’s east, are at early stages of plan-making and there could be scope for joint working on evidence base.

*Existing planning policy team and resources*

* + 1. The current team is small, comprising:
* 1 FTE Planning Policy and Economic Development Manager
* 1.5 FTE Principal Planners
* 1 FTE Planner
* 0.5 FTE admin support
  + 1. The local plan will be additional to core work (business as usual) which includes Authority Monitoring Report, Infrastructure Funding Statement, Five-Year Housing Land Supply, Brownfield Register Updates, Managing the self-build register, statutory returns to Govt, internal consultations on planning applications, ongoing monitoring, contributions to corporate projects etc.
    2. In addition to the ‘business as usual’ identified above, the intention this year is to procure local plan software, update the Statement of Community Involvement, produce an Interim Infrastructure Requirement Plan (to help secure infrastructure with development particularly in the absence of a five-year land supply), and to undertake a call for sites (using the new local plan software to be purchased this year).
    3. A key element of this commission is a resources plan identifying additional resources required to progress the local plan in addition to the work referred to above, and to consider options for procuring those resources.

*Digital / local plan software*

* + 1. We are currently investigating options to procure new local plan software. At present we have no bespoke software for local plan production, although we do have experience of using the Placemaker site assessment tool from Urban Intelligence when preparing a [Settlement Capacity and Intensification Study](https://www.hart.gov.uk/settlement-capacity)).
  1. **Timetable**
     1. The Council is keen to progress the project planning stage as quickly as possible whilst ensuring high quality, robust outputs.
     2. We envisage the consultant being appointed and starting the project mid-April.
     3. Consultants are asked to present how they would go about the task, what engagement with Council officers would look like, and provide a detailed timetable. We assume that the work could take 2 to 3 months from start to finish recognising the complexity and breadth of the task and allowing for thorough engagement with Council staff.
     4. In addition to an Inception meeting, we expect the project planning process to involve multiple touch points with the Council including discussions/ workshops. The Council is flexible as to how these would run but would expect any key group discussions/workshops to be held in-person to better enable discussion and engagement.
  2. **Scope**
     1. The appointed consultant will be responsible for producing the following:
* A comprehensive and detailed Project Initiation Document (PID)
* A Project and Resourcing Plan
  + 1. The PID and Project and Resourcing Plan must cover all stages of plan production and include the following elements:
  + Project objectives
  + Project deliverables
  + Additional resources needed (e.g. budget, staff, external support) including year by year costings.
  + Scope of the local plan
* The national legislative and policy context
* Role of the plan in context of other Council plans and strategies, and other local, county and regional plans and strategies
* Review of existing evidence, identify gaps, define scope of what new evidence is needed
* Governance and decision-making
* Officer working arrangements across the Council
* Communication and engagement with external stakeholders
* Timetable and key milestones.
* Risk management
* Additional resources needed (e.g. budget, staff, external support) including year by year costings.
* Procurement recommendations – how best to fill gaps in evidence base and staff resources, including consideration of joint working with other (neighbouring) local authorities also progressing local plans.
  + 1. This is not intended to be a comprehensive list and the consultant may recommend additional matters to be covered.
    2. It is envisaged that the PID prepared under this commission will be fit for the proposed ‘Gateway 1’ of the new plan making process, or easily adapted to meet any requirements at that stage.
  1. **Deliverables**
     1. The successful bidder must provide the PID and Project and Resource Plan in standard Microsoft 365 formats (Word, Excel, Project) or in a compatible format agreed by the Council.
     2. The project management documentation must comply with [WCAG 2.2 accessibility standards](https://www.w3.org/TR/WCAG22/) (or subsequent standards) and reflect Hart’s branding guidelines were necessary.
  2. **Information available from the Council**
     1. Relevant information held by the Council will be shared with the appointed consultant to inform their research and assessment. Also see the Council’s [Planning Policy webpages](https://www.hart.gov.uk/planning-and-building-control/planning-policy).
     2. The Council will monitor the performance of the Services by the Supplier through fortnightly progress meetings/updates or other arrangements agreed at the inception meeting.

# **Information for Bidders**

* 1. All quotation response documents must be returned to the email address(es) stated on page 1 by no later than the quotation return date also stated on page 1. Quotations received after this time will only be accepted in exceptional circumstances and at the Council’s discretion.
  2. When emailing your completed quotation to the Council you may wish to request a “Delivery Receipt” as evidence of safe delivery.
  3. If there appears to be an error or omission in a quotation the Council may invite the Bidder to confirm the submitted price, including errors/omissions, or amend the submitted price to correct these errors/omissions. All amendments or confirmation of quotation must be confirmed in writing by the Bidder.
  4. If the Council considers a query may have a material effect on quotation responses, all suppliers will be notified without delay via email.
  5. The Council reserves the right to disregard any quotation where:

1. in the opinion of the Council, there is sufficient doubt as to the Bidder’s ability to perform the contract for the submitted price; or
2. it does not fulfil a mandatory or pass / fail requirement; or
3. it contains qualifications that conflict with the Request for Quotation instructions.
   1. Quotations and supporting documents shall be in English and any contract subsequently entered into and its formation, interpretation and performance shall be subject to and in accordance with the laws of England and Wales.
   2. All prices quoted shall, unless otherwise stated, include profit, transport, labour, materials, fuel and plant charges, insurance and all other expenses of every kind which under the conditions of Contract are borne by the Bidder. Prices quoted shall be in UK Sterling and exclusive of Value Added Tax. Value Added Tax shall be applied at the appropriate rate ruling at the date of any invoice.
   3. Bidders must not take part in any publicity activities with any part of the media about the Contract or this opportunity without getting the Council’s written agreement first. This includes the Council’s agreement on the format and content of any publicity.
   4. This opportunity is made available in good faith. The Council give no warranty as to the accuracy or completeness of the information contained in it. The Council also disclaim any liability for any inaccuracy or incompleteness. The Council reserve the right to cancel the Quotation process at any point.
   5. The Council are not liable for any costs resulting from any cancellation of this Quotation process or for any other costs that Bidders may incur by Tendering for this Contract. Bidders must obtain at their own expense all the information that they need for the preparation of their Quotation.
   6. Bidders will be deemed to fully understand the processes that the Council must follow under relevant legislation, and where the value of the opportunity is deemed to be above relevant thresholds, will adhere to the requirements set out in such legislation.

# **Evaluation and award process**

* 1. The contract, if awarded, will be awarded, based on the following criteria:

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | | | **Score** |
| **Price** *(calculated as per 4.2):* | | | **30%** |
| **Quality**  *(which is scored on against the sub-criteria below):* | | | **70%** |
|  | Methodology and approach | *35%* |  |
| Knowledge, experience, case studies and references | *35%* |
|  |  |

* 1. The lowest price will be given the maximum score available. Other scores will then be calculated as a proportion of this based on the formula below:

|  |
| --- |
| Lowest price |
| Price of next quote to be considered |

* 1. The Price element of the evaluation will only be scored once the Quality criteria have been assessed.
  2. Each section in the Quality criteria will be scored using the following template:

|  |  |
| --- | --- |
| Exceptional demonstration by the supplier of the relevant ability, understanding, skills, facilities and quality measures required to provide the services with evidence to support the response, where appropriate. | 5 |
| Good demonstration by the Supplier of the relevant ability, understanding, skills, facilities and quality measures required to provide the services with evidence to support the response, where appropriate. | 4 |
| Satisfactory demonstration by the Supplier of the relevant ability, understanding, skills, facilities and quality measures required to provide the services with evidence to support the response, where appropriate. | 3 |
| Contains minor shortcomings in the demonstration by the Supplier of the relevant ability, understanding, skills, facilities and quality measures required to provide the services with evidence to support the response, where appropriate and/or is inconsistent or in conflict with other proposals with little or no evidence to support the response. | 2 |
| Satisfies the requirement but with considerable reservations of the supplier’s relevant ability, understanding, skills, facilities and quality measures required to provide the services, with little or no evidence to support the response. | 1 |
| No response or irrelevant response provided. | 0 |

* 1. Any responses scoring less than 2 for any Quality criteria, may be considered to not meet the requirements, and therefore fail the evaluation and the quotation may be rejected.
  2. Bidders will be notified via email as soon as possible of any decision made by the Council during the quotation process, including notifying Bidders of the intended award.
  3. As part of the notification of award process, Bidders will be provided with details of the points awarded for their submitted responses in line with the evaluation criteria above.
  4. Bidders must not undertake work without first having received an Official Purchase Order as written notification that they have been awarded the contract and are required to start work.

# **Quotation response: Bidder details and declaration**

* 1. Please complete the following and sign to confirm that your quotation is fully compliant with the Specification, and all Terms and Conditions as stated within this documentation.

|  |  |
| --- | --- |
| Company Name: |  |
| Address: |  |
|  |
|  |
|  |
|  |
| Telephone: |  |
| E-mail: |  |
|  | |
| Signed: |  |
| Print Name: |  |
| Position in Company: |  |
| Date: |  |

# **Quotation response: Bidder submission**

* 1. Please complete the following pricing schedule in full (values must be exclusive of VAT).

|  |  |  |
| --- | --- | --- |
| **Mandatory** |  | **Price** |
| Please provide a total cost for the delivery of all aspects of this quotation including the Project Initiation Document and the Project and Resourcing Plan for Hart District Council’s new Local Plan. | **£** |  |
| **Optional** |  |  |
| Please provide a daily rate for ongoing project management support, for information only, will not be scored. | **£** |  |

* 1. Please complete the following section which will be used to score the Quality criteria.

|  |
| --- |
| Methodology and Approach |
| Your submission should include explanations of how you will:   1. Use robust or established project management techniques 2. Propose effective and realistic ways of working with the Council 3. Establish the additional resources needed to prepare the local plan 4. Prepare the PID and Project and Resource Plan and in what timescales |
| Knowledge, experience, case studies and references |
| Your submission should demonstrate:   1. Knowledge and experience of project planning and project management techniques relevant to the tasks required 2. Knowledge and experience of the local plan making system 3. Where you can bring any insights into the next local plan making system under the Levelling Up and Regeneration Act? 4. Relevant knowledge and experience in relation to resource planning activity 5. Provision of details of relevant experience/case studies 6. Provision at least three relevant references or referees |

# **7. Terms and Conditions of Contract for Services**

Please see separate attachment:

HDC202502 - Draft Short Form Contract for Local Plan Project Planning Support