

Request for Quotation

For the provision of consultancy services to undertake a Conservation Area appraisal and management plan for Oldham Town Centre

Chest Contract Ref: [Insert reference number]

Return Date: - 12 Noon XX XX 2018

Contract Duration

XXXX

For The Oldham Town Centre Conservation Area appraisal and management plan

RFQ Template Document_v3



Section One – Instructions for Completion

Purpose

Oldham Council would like to invite you to provide a quote for the commissioning of the Oldham Town Centre Conservation Area appraisal and management plan.

Queries and clarifications relating to this request for quotation should be via The Chest portal www.the-chest.org.uk

Technical Issues via The Chest

Should any technical issues arise via The Chest, Tenderers are able to log issues via ProcontractSuppliers@proactis.com or going directly to <http://proactis.kayako.com/default>.

For critical and time-sensitive issues (normally requiring resolution within 60 minutes), then please contact the Helpdesk on 0330 005 0352.

Organisation of Document

This document contains the following sections:

- [Section One – Instructions for Completion;](#)
- [Section Two – Background Information;](#)
- [Section Three – Company and Policy Information;](#)
- [Section Four – Specification and Technical Questions;](#)
- [Section Five – Schedule of Costs and Undertaking;](#)

Instructions for Completion

It is essential to comply with the following instructions in the preparation and submission of your quotation.

Your written quotation must be uploaded to The Chest by **12 noon** on **XX XX 2018**.

Your quotation must be completed in full and where necessary signed and dated. Failure to return a completed quotation will invalidate your submission. Your quotation must be completed in English.

Any quotation submitted will be deemed to remain open for acceptance or non-acceptance for not less than 90 days from the closing date stipulated below. The Council may accept the quotation at any time within this prescribed period. The Council shall, however, not be bound to accept the lowest or any quotation.

The standard terms and conditions of Oldham Council will apply to all orders placed as a consequence of this quotation process.

RFQ Return Deadline

Quotations must be received by **12 noon** on **XX XX 2018**.

Quotations received after this date may be disregarded.

Procurement Timetable

The Council intends to award the Contract on or after **XXX** and reserves the right to award the Contract at such date or at a later date, or not at all.

The Council proposes the following timetable for the award of the Contract:

Activity	Date
Dispatch of RFQ	XXX
Return of RFQ	XXX
Evaluation of RFQ completed	XXX
Award contract	XXX

The Council reserves the right to change the above timetable and bidders will be notified accordingly where there is a change in the timetable.

Evaluation Criteria

The objective of the selection process is to assess the responses to the RFQ and then select a preferred bidder.

The evaluation exercise will seek to balance the issues of quality and price to ensure that the chosen bidder offers the most economically advantageous quotation for the Council.

Upon receipt of formal quotes, the Council will be concerned to ensure that there has been full compliance with the RFQ documents, and all necessary information has been supplied. The information supplied will be checked for completeness and compliance before responses are evaluated. The Council shall not be bound to accept the lowest price of any bid submitted.

Section 3 will be marked on a pass/fail basis and this will entail conducting an independent financial credit check, along with the option to take up references. The Council reserve the right to carry out a more in depth financial assessment to determine the financial stability of an organisation.

If you need the opportunity to submit additional evidence that will clarify your financial standing, this should be submitted at question **3.8.1 (d)**

Where we are unable to verify that your organisation:

- Is a legitimate trading organisation;
- Has acceptable levels of financial standing;
- Promotes good practices in areas of employment, health & safety environmental care & protection, and data protection, confidentiality and human rights, then we reserve the right to reject your submission.

Suppliers who self-certify that they meet the requirements in Section 3 will be required to provide evidence at contract award stage.

Section 4 & 5 will be evaluated on the basis of **the most economically advantageous** offer to the Council. The evaluation criteria, and the associated weightings, which will be utilised in this assessment are:-

Technical Capacity	50% Weighting (sub-weightings shown in Section 4)
Social Value	5% Weighting
Price	45% Weighting

The pricing element will be awarded on the basis of a percentage variation between the highest and lowest price with the lowest financial submission receiving the full marks available.

Where a question requires a descriptive answer with an award of 10 marks the following marking regime will be used:

Score	Acceptability	Criteria for awarding scores
0	Unacceptable	The information is either omitted or fundamentally unacceptable.
1 - 2	Poor	The information submitted has insufficient evidence that the specified requirements can be met and / or does not demonstrate acceptable level of quality of the proposed quotation.

Score	Acceptability	Criteria for awarding scores
3 - 4	Somewhat Deficient	The information submitted has some minor omissions against the specified requirements and / or demonstrates only limited level of quality of the proposed quotation.
5 – 6	Satisfactory	The information submitted meets the requirements and / or demonstrates an adequate level of quality of the proposed quotation.
7 – 8	Very good	The information submitted provides good evidence that the specified requirements can be met and demonstrates a good level of quality of the proposed quotation.
9 - 10	Outstanding	The information submitted provides strong evidence of best of sector capability to deliver the specified requirements.

Where a question requires a Yes / No answer; an answer of No may result in the Authority taking the quotation no further, unless it is demonstrated to the Authority's satisfaction that any amendments/ qualifications are strictly necessary to give effect any legal, regulatory or compliancy requirements of any related parties. The Authority reserves the right to reject any such amendments/ qualifications if they are deemed by the Authority not to be strictly necessary or contrary to the principles of the restricted procurement procedure.

Freedom of Information Act (2000)

The Council is a public authority under the Freedom of Information Act 2000 (the "Act").

As part of its duties under the Act, the Council may disclose information to a person making a request unless the information is covered by an exemption under the Act. The Council is required to determine whether the public interest in maintaining the exemption from disclosing it outweighs the public interest in disclosing it.

Suppliers must state in their quotation whether or not they consider the information supplied, if disclosed to a third party, would be prejudicial to their commercial interests and if so, the reasons for such a claim. Suppliers should be aware that although such claims and reasons will be taken into consideration by the Council when deciding whether to disclose information, the Council may still be required to disclose such information so that the Council's statutory obligations are met.

Receipt by the Council of any material marked 'confidential' or equivalent should not be taken to mean that the Council accepts any duty of confidence by virtue of that marking. The Council shall not be responsible for any loss, damage, harm or other detriment however caused arising from the disclosure of any of the confidential information under the Freedom of Information Act or other similar legislation or code.

Section Two - Background Information

Introduction to Oldham

Oldham is a metropolitan borough of Greater Manchester just 6.9 miles (11.1km) north east of the city of Manchester.

Our diverse, young, and growing population of 225,000 is made up of several towns and villages, with Oldham as the administrative centre.

The borough stretches 55 square miles from the Pennine moors and rural communities of Saddleworth to the urban areas of Failsworth and Hollinwood.

Our location between Manchester City Centre and the Peak District countryside makes Oldham an attractive place to live and work.

We are home to 6,000+ businesses spanning across key sectors such as health, advanced manufacturing, construction, retail, and financial and professional services.

Close proximity to the M60 and M62 motorways, and a Metrolink tram route to Manchester city centre, provides Oldham with easy and efficient access to national markets, and a population of 2.6 million within a 30 minute drive time.

Doing things differently

Oldham is a Co-operative Council, ambitious and determined to work with partners to improve the Borough.

Named the Most Improved Council of the year for 2012, we have a proven track record of successful partnerships with the private sector and are leading by example through our ambitious capital programme; investing in schools, health, housing, infrastructure, culture and leisure developments

We are committed to developing the right partnerships to support the economic growth of Oldham and its role within Greater Manchester

The 'Get Oldham Working initiative' -which aimed to create 2,015 job related opportunities by 2015 - is one example of Oldham Council joining forces with partners to support economic growth. Businesses working with the council can benefit from the free of charge 'Get Oldham Working' recruitment service which offers a range of services to businesses:

- Recruitment advice and support
- Free advertising of vacancies to a talent pool of local job seekers
- Free shortlisting service
- Help drawing down funding and grants

Social Value

Oldham Town Centre Conservation Area appraisal and management plan

As a Co-operative Council we are committed to acting in a socially responsible way and to influencing others with whom we work with to do the same. In accordance with the Social Value Act 2012 we must consider social value in all our decisions; about how we spend this value and in addition to ensure that who we work with has the potential to make a major contribution to delivering a co-operative Borough.

It is increasingly important to secure the maximum possible value from every pound of public money that we spend. This means taking into account the cost of each contract, but it also encompasses a broader evaluation of the value of each contract – including the wider social, economic and environmental outcomes each contract can deliver

We are committed to and we expect our suppliers to be committed to:

- Building capacity and sustainability of the voluntary and community sector to enable them to compete for and deliver contracts / services.
- Promoting employment and economic sustainability by actively facilitating skills development and progression both within the organisation and through suppliers / contractors.
- Providing access to local jobs and employment opportunities for Oldham residents.
- Focussing on early intervention, resilience and place based solutions ensure that control of devolved health funding streams maximise social value and benefit to Oldham.
- Promoting environmental sustainability by helping to build the low carbon and environmental business sector in Oldham.
- Actively seeking community participation and engagement in the procurement process by enabling and equipping communities and individuals with the skills and resources to play an active role in service design, decision making and delivery.
- Making a positive contribution towards Oldham's ambitions for healthy homes, green spaces and local amenities.
- Ensuring continuous improvement in the delivery of services and compliance with statutory obligations under section 3 Local Government Act 1999.

For more information on Social Value, please see the Social Value Framework document attached.



Oldham Social
Value Procurement f

Evaluated Question

In order for the Council to be satisfied of any prospective bidder's commitment to supporting the Council in implementing its Social Value principles, can you please include in your quotation submission, a response to the questions on social Values included in the evaluated section of this RFQ at **Q.4**.

Oldham Council is seeking accreditation with the Living Wage Foundation (LWF). This is the organisation which manages and verifies the accreditation process by which organisations can be awarded with the mark as a Living Wage Employer, and so entitled to use this as part of its publicity. This is a voluntary accreditation process.

The Living Wage Foundation Rate (LWFR) is the hourly rate paid to all employee aged 18 and over, at the rate advocated by the Living Wage Foundation. This is updated annually according to the basic cost of living as calculated by the Centre for Research in social policy at Loughborough University.

For the avoidance of doubt, the Living Wage Foundation is not to be confused with the National Living Wage – the information below should help provide clarity regarding this;

Living Wage Foundation (LWF)

- This is an organisation which manages and verifies the accreditation process
- Organisations can be awarded the Living Wage Employer mark
- This is a **voluntary** accreditation process
- The hourly rate is paid to all employees aged 18+
- The hourly rate is updated annually
- More information is available via <http://www.livingwage.org.uk>

National Living Wage

- This is a **statutory** requirement
- The hourly rate is paid to all employers aged 25+
- The hourly rate is updated annually

Section Three – Company and Policy Information

The purpose of this part of the quotation is to obtain details that provide basic information about your organisation and allow us to verify that it:

- is a legitimate trading organisation;
- has acceptable levels of financial standing;
- promotes good practices in areas of employment, health & safety and environmental care & protection.

The Council strongly supports and promotes equal opportunity, fair employment and health & safety, and are committed to the protection and enhancement of the environment. As purchasers of goods, works and services we expect Suppliers and their supply chains, to have a similar approach.

If your submission is for a group of companies or consortia, each must complete Section 4 of this RFQ. You must give details of the legal entity and relationship between members and identify the lead bidder.

Section 3 will be assessed as either ‘Pass’ or ‘Fail’.

Any Quote failing any of the below qualifying criteria, giving rise to concerns which cannot be satisfied, will not be evaluated further.

Suppliers who self-certify that they meet the requirements will be required to provide evidence at contract award stage. Please indicate your answer by marking ‘X’ in the relevant boxes.

3.1 Supplier details

Full name of the Supplier completing the RFQ		
Registered company address		
Registered company number		
Registered charity number		
Registered VAT number		
Name of immediate parent company		
Name of ultimate parent company		
Please mark ‘X’ in the relevant box to indicate your trading status	i) a public limited company	<input type="checkbox"/> Yes
	ii) a limited company	<input type="checkbox"/> Yes
	iii) a limited liability partnership	<input type="checkbox"/> Yes
	iv) other partnership	<input type="checkbox"/> Yes
	v) sole trader	<input type="checkbox"/> Yes
	vi) other (please specify)	<input type="checkbox"/> Yes
Please mark ‘X’ in the relevant boxes to indicate whether any of the following classifications apply to you	i) Voluntary, Community and Social Enterprise (VCSE)	<input type="checkbox"/> Yes
	ii) Small or Medium Enterprise (SME) ¹	<input type="checkbox"/> Yes
	iii) Sheltered workshop	<input type="checkbox"/> Yes
	iv) Public service mutual	<input type="checkbox"/> Yes

3.2 Bidding Model

Please mark 'X' in the relevant box to indicate whether you are;	
<p>a) Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself</p>	<input type="checkbox"/> Yes
<p>b) Bidding as a Prime Contractor and will use third parties to deliver <u>some</u> of the services</p> <p>If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for.</p>	<input type="checkbox"/> Yes
<p>c) Bidding as Prime Contractor but will operate as a Managing Agent and will use third parties to deliver <u>all</u> of the services</p> <p>If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for.</p>	<input type="checkbox"/> Yes
<p>d) Bidding as a consortium but not proposing to create a new legal entity.</p> <p>If yes, please include details of your consortium in the next column and use a separate Appendix to explain the alternative arrangements i.e. why a new legal entity is not being created.</p> <p>Please note that the authority may require the consortium to assume a specific legal form if awarded the contract, to the extent that it is necessary for the satisfactory performance of the contract.</p>	<input type="checkbox"/> Yes <u>Consortium members</u> <u>Lead member</u>
<p>e) Bidding as a consortium and intend to create a Special Purpose Vehicle (SPV).</p> <p>If yes, please include details of your consortium, current lead member and intended SPV in the next column and provide full details of the bidding model using a separate Appendix.</p>	<input type="checkbox"/> Yes <u>Consortium members</u> <u>Current lead member</u> <u>Name of Special Purpose Vehicle</u>

3.3 Contact details

Supplier contact details for enquiries about this RFQ

Oldham Town Centre Conservation Area appraisal and management plan

Name	
Postal address	
Country	
Phone	
Mobile	
E-mail	

3.4 Licensing and registration (please mark 'X' in the relevant box)

3.4.1	<p>Registration with a professional body</p> <p>If applicable, is your business registered with the appropriate trade or professional register(s) in the EU member state where it is established (as set out in Annex XI of directive 2014/24/EU) under the conditions laid down by that member state).</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If Yes, please provide the registration number in this box.</p>
3.4.2	<p>Is it a legal requirement in the state where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If Yes, please provide additional details within this box of what is required and confirmation that you have complied with this.</p>

3.5 Grounds for Mandatory Exclusion

You will be excluded from the procurement process if there is evidence of convictions relating to specific criminal offences including, but not limited to, bribery, corruption, conspiracy, terrorism, fraud and money laundering, or if you have been the subject of a binding legal decision which found a breach of legal obligations to pay tax or social security obligations (except where this is disproportionate e.g. only minor amounts involved).

If you have answered "yes" to question 3.5.2 on the non-payment of taxes or social security contributions, and have not paid or entered into a binding arrangement to pay the full amount, you

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may still avoid exclusion if only minor tax or social security contributions are unpaid or if you have not yet had time to fulfil your obligations since learning of the exact amount due. If your organisation is in that position please provide details using a separate Appendix. You may contact the authority for advice before completing this form.

3.5.1 Within the past five years, has your organisation (or any member of your proposed consortium, if applicable), Directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences?	Please indicate your answer by marking 'X' in the relevant box.	
	Yes	No
(a) conspiracy within the meaning of section 1 or 1A of the Criminal Law Act 1977 or article 9 or 9A of the Criminal Attempts and Conspiracy (Northern Ireland) Order 1983 where that conspiracy relates to participation in a criminal organisation as defined in Article 2 of Council Framework Decision 2008/841/JHA on the fight against organised crime;		
(b) corruption within the meaning of section 1(2) of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906;		
(c) the common law offence of bribery;		
(d) bribery within the meaning of sections 1, 2 or 6 of the Bribery Act 2010; or section 113 of the Representation of the People Act 1983;		
(e) any of the following offences, where the offence relates to fraud affecting the European Communities' financial interests as defined by Article 1 of the Convention on the protection of the financial interests of the European Communities:		
(i) the offence of cheating the Revenue;		
(ii) the offence of conspiracy to defraud;		
(iii) fraud or theft within the meaning of the Theft Act 1968, the Theft Act (Northern Ireland) 1969, the Theft Act 1978 or the Theft (Northern Ireland) Order 1978;		
(iv) fraudulent trading within the meaning of section 458 of the Companies Act 1985, article 451 of the Companies (Northern Ireland) Order 1986 or section 993 of the Companies Act 2006;		
(v) fraudulent evasion within the meaning of section 170 of the Customs and Excise Management Act 1979 or section 72 of the Value Added Tax Act 1994;		
(vi) an offence in connection with taxation in the European Union within the meaning of section 71 of the Criminal Justice Act 1993;		

(vii) destroying, defacing or concealing of documents or procuring the execution of a valuable security within the meaning of section 20 of the Theft Act 1968 or section 19 of the Theft Act (Northern Ireland) 1969;		
(viii) fraud within the meaning of section 2, 3 or 4 of the Fraud Act 2006; or		
(ix) the possession of articles for use in frauds within the meaning of section 6 of the Fraud Act 2006, or the making, adapting, supplying or offering to supply articles for use in frauds within the meaning of section 7 of that Act;		
(f) any offence listed—		
(i) in section 41 of the Counter Terrorism Act 2008; or		
(ii) in Schedule 2 to that Act where the court has determined that there is a terrorist connection;		
(g) any offence under sections 44 to 46 of the Serious Crime Act 2007 which relates to an offence covered by subparagraph (f);		
(h) money laundering within the meaning of sections 340(11) and 415 of the Proceeds of Crime Act 2002;		
(i) an offence in connection with the proceeds of criminal conduct within the meaning of section 93A, 93B or 93C of the Criminal Justice Act 1988 or article 45, 46 or 47 of the Proceeds of Crime (Northern Ireland) Order 1996;		
(j) an offence under section 4 of the Asylum and Immigration (Treatment of Claimants etc.) Act 2004;		
(k) an offence under section 59A of the Sexual Offences Act 2003;		
(l) an offence under section 71 of the Coroners and Justice Act 2009		
(m) an offence in connection with the proceeds of drug trafficking within the meaning of section 49, 50 or 51 of the Drug Trafficking Act 1994; or		
(n) any other offence within the meaning of Article 57(1) of the Public Contracts Directive—		
(i) as defined by the law of any jurisdiction outside England and Wales and Northern Ireland; or		
(ii) created, after the day on which these Regulations		

<p>were made, in the law of England and Wales or Northern Ireland.</p>		
<p><u>Non-payment of taxes</u></p> <p>3.5.2 Has it been established by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which your organisation is established (if outside the UK), that your organisation is in breach of obligations related to the payment of tax or social security contributions?</p>	<p>Please indicate your answer by marking 'X' in the relevant box.</p>	
	<p>Yes</p>	<p>No</p>
<p>If you have answered Yes to this question, please use a separate Appendix to provide further details. Please also use this Appendix to confirm whether you have paid, or have entered into a binding arrangement with a view to paying, including, where applicable, any accrued interest and/or fines?</p>		

3.6 Grounds for Discretionary Exclusion – Part 1

The authority may exclude any Supplier who answers 'Yes' in any of the following situations set out in paragraphs (a) to (i);

<p>3.6.1 Within the past three years, please indicate if any of the following situations have applied, or currently apply, to your organisation.</p>	<p>Please indicate your answer by marking 'X' in the relevant box.</p>	
	<p>Yes</p>	<p>No</p>
<p>(a) your organisation has violated applicable obligations referred to in regulation 56 (2) of the Public Contracts Regulations 2015 in the fields of environmental, social and labour law established by EU law, national law, collective agreements or by the international environmental, social and labour law provisions listed in Annex X to the Public Contracts Directive as amended</p>		

from time to time;		
(b) your organisation is bankrupt or is the subject of insolvency or winding-up proceedings, where your assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State;		
(c) your organisation is guilty of grave professional misconduct, which renders its integrity questionable;		
(d) your organisation has entered into agreements with other economic operators aimed at distorting competition;		
(e) your organisation has a conflict of interest within the meaning of regulation 24 of the Public Contracts Regulations 2015 that cannot be effectively remedied by other, less intrusive, measures;		
(f) the prior involvement of your organisation in the preparation of the procurement procedure has resulted in a distortion of competition, as referred to in regulation 41, that cannot be remedied by other, less intrusive, measures;		
(g) your organisation has shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions;		
(h) your organisation— (i) has been guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria; or (ii) has withheld such information or is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015; or		
(i) your organisation has undertaken to		
(aa) unduly influence the decision-making process of the contracting authority, or		
(bb) obtain confidential information that may confer upon your organisation undue advantages in the procurement procedure; or		
(j) your organisation has negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award.		

Conflicts of interest

In accordance with question 3.6.1 (e), the authority may exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform the authority, detailing the conflict in a separate Appendix. Provided that it has been carried out in a transparent manner, routine pre-market engagement carried out by the authority should not represent a conflict of interest for the Supplier.

Taking Account of Bidders' Past Performance

In accordance with question (g), the authority may assess the past performance of a Supplier (through a Certificate of Performance provided by a Customer or other means of evidence). The authority may take into account any failure to discharge obligations under the previous principal relevant contracts of the Supplier completing this RFQ. The authority may also assess whether specified minimum standards for reliability for such contracts are met.

In addition, the authority may re-assess reliability based on past performance at key stages in the procurement process (i.e. Supplier selection, evaluation, contract award stage etc.). Suppliers may also be asked to update the evidence they provide in this section to reflect more recent performance on new or existing contracts (or to confirm that nothing has changed).

'Self-cleaning'

Any Supplier that answers 'Yes' to questions 3.5.1, 3.5.2 and 3.6.1 should provide sufficient evidence, in a separate Appendix, that provides a summary of the circumstances and any remedial action that has taken place subsequently and effectively "self-cleans" the situation referred to in that question. The Supplier has to demonstrate it has taken such remedial action, to the satisfaction of the authority in each case.

If such evidence is considered by the authority (whose decision will be final) as sufficient, the economic operator concerned shall be allowed to continue in the procurement process.

In order for the evidence referred to above to be sufficient, the Supplier shall, as a minimum, prove that it has;

- paid or undertaken to pay compensation in respect of any damage caused by the criminal offence or misconduct;
- clarified the facts and circumstances in a comprehensive manner by actively collaborating with the investigating authorities; and
- taken concrete technical, organisational and personnel measures that are appropriate to prevent further criminal offences or misconduct.

The measures taken by the Supplier shall be evaluated taking into account the gravity and particular circumstances of the criminal offence or misconduct. Where the measures are considered by the authority to be insufficient, the Supplier shall be given a statement of the reasons for that decision.

3.7 Grounds for Discretionary Exclusion – Part 2

The authority reserves the right to use its discretion to exclude a Supplier where it can demonstrate the Supplier’s non-payment of taxes/social security contributions where no binding legal decision has been taken.

Please note that Section 3.7 relating to tax compliance only applies where the authority has indicated that the contract is over £5million in value, and the authority is a Central Government Department (including their Executive Agencies and Non-Departmental Public Bodies).

“Occasion of Tax Non-Compliance” means:

- (a) any tax return of the Supplier submitted to a Relevant Tax Authority on or after 1 October 2012 is found to be incorrect as a result of:
 - 1. a Relevant Tax Authority successfully challenging the Supplier under the General Anti-Abuse Rule or the Halifax Abuse Principle or under any tax rules or legislation that have an effect equivalent or similar to the General Anti-Abuse Rule or the Halifax Abuse Principle;
 - 2. the failure of an avoidance scheme which the Supplier was involved in, and which was, or should have been, notified to a Relevant Tax Authority under the DOTAS or any equivalent or similar regime; and/or
- (b) the Supplier’s tax affairs give rise on or after 1 April 2013 to a criminal conviction in any jurisdiction for tax related offences which is not spent at the Effective Date or to a penalty for civil fraud or evasion

From 1 April 2013 onwards, have any of your company’s tax returns submitted on or after 1 October 2012; (Please indicate your answer by marking ‘X’ in the relevant box).		
3.7.1	Given rise to a criminal conviction for tax related offences which is unspent, or to a civil penalty for fraud or evasion;	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.7.2	Been found to be incorrect as a result of: <ul style="list-style-type: none"> ▪ HMRC successfully challenging it under the General Anti-Abuse Rule (GAAR) or the “Halifax” abuse principle; or ▪ A Tax Authority in a jurisdiction in which the legal entity is established successfully challenging it under any tax rules or legislation that have an effect equivalent or similar to the GAAR or the “Halifax” abuse principle; or ▪ the failure of an avoidance scheme which the Supplier was involved in and which was, or should have been, notified under the Disclosure of Tax Avoidance Scheme (DOTAS) or any equivalent or similar regime in a jurisdiction in which the Supplier is established. 	<input type="checkbox"/> Yes <input type="checkbox"/> No

If answering “Yes” to either 3.7.1 or 3.7.2 above, the Supplier may provide details of any mitigating factors that it considers relevant and that it wishes the authority to take into consideration. This could include, for example:

- Corrective action undertaken by the Supplier to date;
- Planned corrective action to be taken;
- Changes in personnel or ownership since the Occasion of Non-Compliance (OONC); or
- Changes in financial, accounting, audit or management procedures since the OONC.

In order that the authority can consider any factors raised by the Supplier, the following information should be provided:

- A brief description of the occasion, the tax to which it applied, and the type of “non-compliance” e.g. whether HMRC or the foreign Tax Authority has challenged pursuant to the GAAR, the “Halifax” abuse principle etc.
- Where the OONC relates to a DOTAS, the number of the relevant scheme.
- The date of the original “non-compliance” and the date of any judgement against the Supplier, or date when the return was amended.
- The level of any penalty or criminal conviction applied.

3.8 Economic and Financial Standing

FINANCIAL INFORMATION							
3.8.1	<p>Please state which of the following you can provide (if requested) to demonstrate your economic/financial standing; Please indicate your answer with an ‘X’ in the relevant box.</p>						
	<table border="1" style="width: 100%;"> <tr> <td style="width: 80%;">(a) A copy of the audited accounts for the most recent two years</td> <td style="width: 20%;"></td> </tr> <tr> <td>(b) A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation</td> <td></td> </tr> <tr> <td>(c) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position</td> <td></td> </tr> </table>	(a) A copy of the audited accounts for the most recent two years		(b) A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation		(c) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position	
(a) A copy of the audited accounts for the most recent two years							
(b) A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation							
(c) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position							

	(d) Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).					
3.8.2	Not Used. Minimum levels of economic and financial standing and/or a minimum financial threshold.					
3.8.3	<p>(a) Are you are part of a wider group (e.g. a subsidiary of a holding/parent company)?</p> <p>If yes, please provide the name below:</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Name of the organisation</td> <td></td> </tr> <tr> <td>Relationship to the Supplier completing the RFQ</td> <td></td> </tr> </table> <p>If yes, please confirm that you can provide (if requested) Ultimate / Parent company accounts if available.</p> <p>If yes, would the Ultimate / parent company be willing to provide a guarantee if necessary?</p> <p>If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank?)</p>	Name of the organisation		Relationship to the Supplier completing the RFQ		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
Name of the organisation						
Relationship to the Supplier completing the RFQ						


3.9 Insurance

<p>Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below:</p> <p>Employer's (Compulsory) Liability Insurance = £10m Public Liability Insurance = £5m Professional Indemnity Insurance = £2m</p> <p>* It is a legal requirement that all companies hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
--	---

3.10 Compliance with Equality Legislation

For organisations working outside of the UK please refer to equivalent legislation in the country that you are located.	
1.	In the last three years, has any finding of unlawful <input type="checkbox"/> Yes

	discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	<p>In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds of alleged unlawful discrimination?</p> <p>If you have answered “yes” to one or both of the questions in this module, please provide, as a separate Appendix, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.</p> <p>If the investigation upheld the complaint against your organisation, please use the Appendix to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.</p> <p>You may be excluded if you are unable to demonstrate to the authority’s satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	If you use sub-contractors, do you have processes in place to check whether any of the above circumstances apply to these other organisations?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.	<p>Does your organisation ensure fair employment, both as a direct employer and in the organisations in your supply chain by, for example:</p> <p>Comply with National Minimum Wage (NMW) and National Living Wage (NLW) requirements, as defined in the NMW 2016 Regulations (Amendment)?</p> <p>Comply with working time directives?</p> <p>Encouraging training, employee relations, employee development, trade union recognition, consultation with the workforce, and dispute resolution?</p> <p>With reference to Section 2.2, does your organisation pay all employees the Living Wage Foundation Rates (LWFR)?</p> <p>If your answer to the above question is No please can you confirm;</p> <ul style="list-style-type: none"> • if your organisation is actively working towards paying all employees the LWFR? 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No

	<ul style="list-style-type: none"> the total number of staff in your organisation: the total number of staff in your organisation that you pay the LWFR or above: the total number of staff in your organisation that you do not pay the LWFR or above: the lowest hourly rate that you pay your employees aged 18 or over, excluding apprentices: 	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
5.	If successful, would your organisation be interested in signing up to the Council's Fair Employment Charter?	<input type="checkbox"/> Yes <input type="checkbox"/> No  FEC leaflet Sept 30.pdf

3.11 Environmental Management – NOT USED

3.12 Health and Safety

Please self-certify that your organisation has a Health and Safety Policy that complies with current legislative requirements.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Has your organisation or any of its Directors or Executive Officers been in receipt of enforcement/remedial orders in relation to the Health and Safety Executive (or equivalent body) in the last 3 years?</p> <p>If your answer to this question was “Yes”, please provide details in a separate Appendix of any enforcement/remedial orders served and give details of any remedial action or changes to procedures you have made as a result.</p> <p>The authority will exclude bidder(s) that have been in receipt of enforcement/remedial action orders unless the bidder(s) can demonstrate to the authority's satisfaction that appropriate remedial action has been taken to prevent future occurrences or breaches.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you use sub-contractors, do you have processes in place to check whether any of the above circumstances apply to	<input type="checkbox"/> Yes

these other organisations?	<input type="checkbox"/> No
----------------------------	-----------------------------

3.13 Data Protection, Confidentiality and Human Rights

<p>Please self-certify that your organisation is registered with the Information Commissioner's Office in relation to Data Protection Act 1998.</p> <p>Please provide your ICO Registration number -</p> <p>If no explain what exemption applies below:</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Please self-certify that your organisation has a Data Protection Policy in place that complies with current legislative/best practice requirements and includes:</p> <p>Information Security Management System (accredited to ISO 27001 or an equivalent standard) Extent of protective controls in place Encryption standards whilst data is at rest and in transit Resisting cyber-attack and malware prevention Records Management Business Continuity</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Please self-certify that all personnel engaged by you receive Data Protection, Confidentiality and Privacy Training?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Has your organisation or any of its Directors or Executive Officers been in receipt of enforcement action for breaching the Data Protection Act 1998. In the last 3 years?</p> <p>If your answer to this question was "Yes", please provide details in a separate Appendix of any enforcement action and give details of any remedial action or changes to procedures you have made as a result.</p> <p>The authority will exclude bidder(s) that have been in receipt of enforcement action orders unless the bidder(s) can demonstrate to the authority's satisfaction that appropriate remedial action has been taken to prevent future occurrences or breaches.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>If you use sub-contractors, do you have processes in place to check that these organisations conform with the above assurances?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

3.15 References

Relevant experience and contract examples				
<p>Please provide details of up to <u>three</u> contracts, in any combination from either the public or private sector, that are relevant to the authority's requirement. Contracts for supplies or services should have been performed during the past <u>three</u> years. Works contracts may be from the past <u>five</u> years, and VCSEs may include samples of grant funded work.</p> <p>The named customer contact provided should be prepared to provide written evidence to the authority to confirm the accuracy of the information provided below.</p> <p>Consortia bids should provide relevant examples of where the consortium has delivered similar requirements; if this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle will be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).</p> <p>Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the principal intended provider(s) or sub-contractor(s) who will deliver the supplies and services.</p> <p>Please note that you must contact your referees prior to giving their contact details to ensure that they are aware and consent to be contacted with regards to this quotation.</p> <p>You must ensure that their information is current and up to date, as not doing so will significantly delay the quotation process.</p> <p>References will not be scored as part of the quotation process but will be used to confirm the standing of bidders. Any queries arising from the reference may be checked with the relevant organisation and should Oldham Council be unsatisfied with a reference then it reserves the right to discount the supplier from the process.</p>				
		Contract 1	Contract 2	Contract 3
	Name of customer organisation			
	Point of contact in customer organisation Position in the organisation E-mail address			
	Contract start date Contract completion date			

	Estimated Contract Value			
	<p>In no more than 500 words, please provide a brief description of the contract delivered including evidence as to your technical capability in this market.</p>			
<p>If you cannot provide at least one example, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start-up.</p>				

Section Four – Specification and Technical Questions

Specification

4.1 Introduction

The purpose of this commission is to prepare an updated Conservation Area Appraisal and Management Plan for Oldham Town Centre Conservation Area.

The appraisal and management plan will help inform the strategy and policies within the Oldham Local Plan review and implementation of the Oldham Town Centre Masterplan. It will also be a material consideration when determining planning applications that would affect Oldham Town Centre Conservation Area.

This section sets out the context, tasks and outputs for the project.

4.2 Current position

Oldham Local Plan

Oldham Council's planning policies are set out within the adopted Oldham Joint Core Strategy and Development Management Policies Development Plan Document (the 'Joint DPD') (2011) along with the adopted proposals map. The DPD and proposals map can be viewed at https://www.oldham.gov.uk/info/200709/documents_in_the_local_development_framework/978/option_of_joint_core_strategy_and_development_management_policies_development_plan_documents_dpds

The Joint DPD identifies that Oldham currently has 36 conservation areas (CA) which are identified on the proposals map. Policy 24 'Historic Environment' seeks to protect and enhance Conservation Areas.

There now needs to be a review of the existing Local Plan (Joint DPD) due to changes and requirements set out in national planning guidance. As part of this there is a need for up to date evidence to inform the Local Plan review and its implementation when adopted. There is also a need for evidence to support the implementation of the Oldham Town Centre Masterplan.

Oldham Town Centre Masterplan

A Masterplan has recently been prepared for Oldham Town Centre looking ahead to 2035. This looks at strategic sites totalling 21 acres in size and seeks to find better uses that can redevelop and improve the Town Centre.

The benefits would include the building of new homes, 54,000 sq metres of new and refurbished employment space, and economic activity worth an additional £48 million a year to Oldham's economy.

The proposals include:

- New Civic Hub office buildings – bringing together the council and other public sector organisations in one space;
- A new market hall, with associated retail and a new multi storey car park;
- New residential opportunities;
- New hotel; and

Oldham Town Centre Conservation Area appraisal and management plan

- And new connected public realm.

The Conservation Area appraisal and management plan will help to feed into the delivery of the Town Centre Masterplan

The masterplan can be viewed here

https://www.oldham.gov.uk/info/200692/invest_in_oldham/1817/town_centre_masterplan.

Updated Oldham Town Centre Conservation Area Appraisal and Management Plan

As a consequence for up to date evidence to inform the Local Plan and implementation of the Town Centre masterplan a Conservation Area appraisal and management plan will be carried out for Oldham Town Centre.

Oldham Town Centre Conservation Area appraisal and management plan is also seen as a high priority as it has been surveyed as part of the Historic England Heritage at Risk Assessment. As a consequence of this assessment, the Conservation Area has been included on the Conservation Area at Risk Register. An up to date Conservation Area appraisal and management plan are required in order to re-assess the designated area and evaluate and record its special interest. The last Conservation Area appraisal for Oldham Town Centre was published in April 1997 (a hard copy is available to the appointed consultants).

Greater Manchester Strategic Framework

The preparation of the Local Plan review is happening in the context of a Greater Manchester Spatial Framework (GMSF) (a joint plan) being prepared. The GMSF will address strategic matters such as housing and employment land requirements along with associated infrastructure and strategic policies on the natural and built environment. The GMSF will have implications for the Oldham Local Plan such as setting out remaining housing and employment land requirements and will set out the further detail to be provided at a local policy level.

4.3 National Policy Context

National Planning Policy Framework

[National Planning Policy Framework](#) (NPPF) states Local Plans should set out a positive strategy for the conservation and enjoyment of the historic environment, including heritage assets most at risk through neglect, decay or other threats. Paragraph 126 states that the council should take into account:

- the desirability of sustaining and enhancing the significance of heritage assets and putting them to viable uses consistent with their conservation;
- the wider social, cultural, economic and environmental benefits that conservation of the historic environment can bring;
- the desirability of new development making a positive contribution to local character and distinctiveness; and
- opportunities to draw on the contribution made by the historic environment to the character of a place.

Paragraph 127 states when considering the designation of Conservation Areas, Local Planning Authorities (LPAs) should ensure that an area justifies such status because of its special

Oldham Town Centre Conservation Area appraisal and management plan

architectural or historic interest, and that the concept of conservation is not devalued through the designation of areas that lack special interest.

The NPPF explains that the council should look for opportunities for new development within Conservation Areas and within the setting of heritage assets to enhance or better reveal their significance.

The appointed consultants should also take into account proposed changes to NPPF regarding the historic environment, including definitions within the glossary, as set out in the [Draft Revised NPPF](#).

Planning Practice Guidance

The planning practice guidance that supports NPPF states that LPAs need to ensure that the area has sufficient special architectural or historic interest to justify its designation as a conservation area.

LPAs must review their conservation areas from time to time. A conservation area appraisal can be used to help local planning authorities develop a management plan and appropriate policies for the Local Plan. A good appraisal will consider what features make a positive or negative contribution to the significance of the conservation area, thereby identifying opportunities for beneficial change or the need for planning protection.

The appointed consultants should also take into account proposed changes to the Planning Practice Guidance as set out in the [Draft Planning Practice Guidance](#).

Historic England Advice Note 1 - Conservation Area Designation, Appraisal and Management

This guidance sets out information on Conservation Area appraisal and management to help implement historic environment legislation, NPPF and the relevant information in planning practice guidance.

The guidance recognises that change is inevitable and often beneficial and sets out guidance to manage change in a way that conserves and enhances historic areas.

The appraisal should have the following benefits:

- As a tool to demonstrate the area's special interest;
- As explanation to owners, businesses and inhabitants of the reason for designation;
- As educational and informative documents created with the local community, expressing what the community particularly values about the place they live and work in;
- Greater understanding and articulation of its character which can be used to develop a robust policy framework for planning decisions;
- Informing those considering investment in the area in guiding the scale, form and content of new development;
- When adopted it will be material in the determination of planning appeals and to Secretary of State decisions, including those where urgent works are proposed to preserve an unlisted building in a Conservation Area;

- Assistance in developing a management plan for the Conservation Area by providing the analysis of what is positive and negative, and in opportunities for beneficial change and enhancement or the need for additional protection and restraint (including Article 4 directions); and
- Better understanding of archaeological potential, perhaps by identifying and mapping archaeologically sensitive areas and thus guiding development towards less sensitive locations.

It adds that it is important to note that designation in itself will not protect an area from incremental change which can erode its character. Where appraisals have not been reviewed for some time, the special interest of the area may have changed or been diluted.

Section 3 of the Historic England Advice Note sets out more detailed information on the benefits and methodology which should be taken into account in the Oldham Town Centre conservation area appraisal.

In terms of managing change the guidance states that Section 71 of the Planning (Listed Buildings and Conservation Areas) Act 1990 places duty to publish proposals for the preservation and enhancement of Conservation Areas. Management plans can channel development pressure to conserve the special quality of the Conservation Area. Areas in relative economic decline and areas under development pressure can benefit from management opportunities that promote beneficial change. Management plans must be presented at a public meeting and involve stakeholders such as utility companies.

The Historic England Advice Note explains that guidance should explain why the area has been designated, what constraints and opportunities result from designation (including restrictions on permitted development, the need for consent for demolition of buildings over 115 cubic metres and the need to give prior notice before undertaking works to trees).

General advice might cover:

- Controls, limitations and opportunities for enhancement including local plan policies;
- Topics relevant to conservation areas, such as retail policies;
- Specific issues such as replacement windows and doors;
- Parameters for extensions;
- Design of shop fronts including the use of security shutters;
- Outdoor advertisements; and
- Controls of permitted development (including Article 4 directions)

Historic England is proposing to update [Conservation Area Appraisal, Designation and Management: Historic England Advice Note 1](#). The consultation draft should be taken into account in preparing the tender, appraisal and management plan.

4.4 Oldham Town Centre Conservation Area

Oldham Town Centre Conservation Area includes the remaining historic nucleus of the Town and contains a high concentration of listed buildings and other buildings of quality which add considerably to the character of the area.

Oldham Town Centre Conservation Area appraisal and management plan

The Town remained a very small settlement until the Industrial Revolution. The area was then the subject of rapid change and retains an easily recognisable historic character, whilst displaying many interesting features and a diversity of treatments and styles. To the north, particularly in Church Lane and along the north-south connecting streets, the Conservation Area retains a more domestic scale. Whilst the larger civic buildings, constructed on the more grand Union Street, show the later, more nationalistic style, following the investment in the area as it rose to international prominence from the late 18th Century onwards.

The topography of the town contributes considerably to the character of the Conservation Area. Oldham developed as a small hill top settlement on an ancient cross Pennine route between Manchester and York. The location of the current Parish Church has ancient origins and was a prominent landmark until the late 18th century. This location, on a hilltop, provides the Conservation Area with commanding views of the surrounding Town. It is also of note that whilst the Area includes the historic centre of the town, incorporating the Parish Church, War Memorial and Town Hall, it also has a straggling linear configuration without a particularly well defined edge.

The Conservation Area remains on the 'Heritage at Risk' register due to the large listed buildings which remain empty. However, it has benefitted from the award winning conversion of the former Town Hall into a cinema and restaurants and the conversion of the library to a heritage and arts centre. Both projects are centred on retaining the heritage value of the Grade II listed buildings and contributing to the character of the area.

4.5 Project Aims

The Project aims are to produce a Conservation Area Appraisal document and a Management Plan. The appraisal will provide the following:

- A tool to demonstrate the areas special interest;
- An explanation to owners, businesses and inhabitants of the reasons for designation;
- Educational and informative documents created with the local community, expressing what the community particularly values about the place. The methodology for consultation will be agreed with the council;
- Greater understanding and articulation of its character which can be used to develop a robust policy framework for planning decisions (including the Local Plan and design policies relating to Oldham Town Centre (for example a tall buildings policy);
- Information for those considering investment in the area in guiding the location, scale, form and content of new development;
- Identifying if there are sites which contribute significantly to the character of the area and whether such sites would benefit from limited development; and
- Better understanding of archaeological potential, perhaps by identifying and mapping archaeologically sensitive areas and thus guiding development towards less sensitive locations.

Following the production of the appraisal document and a thorough consultation process, the consultants will then use the appraisal to assist in development of a Management Plan for the Conservation Area. It should provide the analysis of what is positive and negative, and identify

opportunities for beneficial change and enhancement, or the need for additional protection and restraint (including the use of Article 4 directions²).

Once adopted, it will be material to the determination of planning and listed building applications, including those where urgent works are proposed to preserve an unlisted building in a Conservation Area.

4.6 Key Tasks

The key tasks for the appraisal and management plan are to review the Conservation Area appraisal and address the issues, threats and opportunities relating to the Town Centre Conservation Area.

It is some time since the Conservation Area has been reviewed and a number of changes have occurred within the local area. As part of the assessment, work will need to be completed on reviewing boundaries and updating appraisal work taking account of changes in the local area, other nearby heritage assets in the locality, the Vibrant Centres SPD and other planning guidance, for example with regard to setting, etc., and historic landscape character work completed in the Greater Manchester Urban Historic Landscape Characterisation Report (March 2012).

The Oldham Town Centre Conservation Area Appraisal should take into account the previous character appraisal produced in April 1997 by Stephen Levrant 'Heritage Architecture' and the updated appraisal should include the following:

- A review of what has changed since the last character appraisal. The updated appraisal should include a dated photographic record of each building;
- Confirming (or redefining) the special interest that warrants designation; and
- Consideration of the whole town centre boundary, particularly the areas suggested in the original report as possible extensions to the Conservation Area or new areas within the Town Centre, including the Goldburn route, and the Jackson Pit area, which may form separate Conservation Areas. The area of the Town Centre Masterplan will also be considered. Consideration should also be given to whether any areas should be taken out of the Conservation Area designation.

The following issues, threats and opportunities relating to the Oldham Town Centre Conservation Area have been identified and would need to be addressed within the appraisal and management plan:

- Large empty listed buildings currently for sale or seeking uses;
- The need to address the incremental loss of character through small scale change;
- The need to maximise the positive momentum associated with the large scale development of the buildings within the 'Cultural Quarter' of the Town;
- The need to have a clear understanding of how this area influences and will be influenced by large scale development in the surrounding area;

² An article 4 direction is a direction under article 4 of the General Permitted Development Order which enables the Secretary of State or the local planning authority to withdraw specified permitted development rights across a defined area.

- The lack of robust parameters to guide the form and content for new development within the Conservation Area to ensure effective development management; and recommendations and opportunities for improvement;
- The lack of robust guidelines for public realm works;
- The means of introducing the sustainable technology in the area;
- The need to consider the ongoing preparation of the Local Plan review, including any allocations that may be within or in close proximity to the Conservation Area and its setting;
- The need to inform design policy and guidance, including advice on tall buildings within the Town Centre;
- The need to inform the preparation and delivery of the Oldham Town Centre Masterplan;
- The need to provide effective guidance to inform the Council grant scheme which is investing in the Town Centre; and
- The need to address enforcement issues within the Town Centre and consider the use of additional protection measures, such as Article 4's, Urgent Works Notices, etc.

4.7 Methodology

Work will need to be carried out in compliance with 'Historic England Advice Note 1 - Conservation Area Designation, Appraisal and Management' with regard given to the draft Conservation Area Appraisal, Designation and Management: Historic England Advice Note 1 currently out for consultation. An outline of the stages are set out below. However it is expected that the consultants would set out a detailed methodology as part of their tender and confirm this at the Inception meeting.

Stage 1 – confirm methodology. Agree with the steering client group the proposed methodology for the character appraisal and subsequent management plan, key milestones and information required by the consultants;

Stage 2 – Desk based analysis of existing information including the 1997 Conservation Area Appraisal;

Stage 3 – Gap filling to appraise wider Town Centre area and updating information;

Stage 4 – Analysis and production of draft Conservation Area appraisal and management plan reports;

Stage 5 – Public consultation to be agreed with the council;

Stage 6 – Production of reports with consideration of views expressed at consultation stage; and

Stage 7 – Publication of final Conservation Area appraisal and management plan.

4.8 Consultation

Part of the project requirements will be to satisfy the legislation contained in Section 71 of the Planning (Listed Building and Conservation Areas) Act 1990.

A draft Conservation Area Appraisal and Management plan must as a minimum be produced and published on the council's website, accompanied by an electronic comments sheet/feedback form in order to involve the wider community before the appraisal is too far advanced to exclude further influence on the outcome.

The Act also requires the Local Authority to submit proposals for consideration to a public meeting in the area. This may run parallel with the online consultation. The consultants would be expected to be present at such a meeting.

The report would then be expected to include details of how community involvement has been undertaken; how the input from the community was evaluated; and how it has influenced the definition of special interest and the recommendations of the report.

The consultation will be co-ordinated by the Strategic Planning and Information team.

The consultants should prepare and submit an engagement plan together with fee proposals for carrying out the consultation on the appraisal and management plan.

In addition an inception meeting and regular progress meetings will need to take place throughout the commission. These meetings may include officers from Oldham Council's Planning and Regeneration teams.

Engagement with a wider audience would also be expected, including the Local Studies Officer; elected members; the Greater Manchester Archaeological Advisory Service; civic groups; utility companies, statutory undertakers and the highway authority.

4.9 Timetable and Project Milestones

It is anticipated Stage 1 will be completed within 2 weeks from the date of appointment. Stage 2 within 6 weeks from the date of appointment. Stage 3-4 within 3 months, with public consultation undertaken Autumn 2018, and final reports submitted by December 2018.

4.10 Document Structure

The format of the Conservation Area Appraisal should follow the recommendations noted in the Historic England Advice Note 1.

The documents should be user friendly and accessible to a range of users from the public to planning officers and developers. The documents should make good use of graphic presentation.

Electronic copies and 5 hard copies of the final documents should be provided as well as any GIS shape files.

4.11 Provision of Information

Oldham Council will provide the appointed consultants with access to a range of available existing information and background documents. This would be agreed at the inception meeting.

Some of the key documents that will be made available are:

- [GIS of the existing Oldham Town Centre Conservation Area](#);
- [GIS of Oldham Town Centre and allocations within the Town Centre](#);
- Oldham Town Centre Conservation Area Character Appraisal (1997);
- [Oldham Joint Core Strategy and Development Management Policies Development Plan Document \(DPD\) \(2011\)](#);

Oldham Town Centre Conservation Area appraisal and management plan

- [Oldham Town Centre Masterplan](#);
- Information on key projects in the pipeline within Oldham Town Centre;
- Relevant appeal decisions;
- [Oldham Urban Historic Landscape Characterisation Report](#);
- [Oldham Vibrant Centres SPD](#);
- Strategic Housing Land Availability Assessment; and
- Details of Oldham Council grant programmes.

4.12 Management Arrangements

The commission will be managed by Strategic Planning and Information with significant input from the Council's Conservation Officer and a representative from regeneration.

4.13 Resources and Personnel

Tenderers must specify how their project team will be set up, who will lead it and the roles each member of the team will play. Curriculum Vitae of the Project Director, Project Manager, and for all staff assigned to the project.

A clear day to day project manager must be identified who will be the main point of contact and who will have full knowledge of every aspect of the project.

4.14 Additional Work

The findings of the appraisal will form part of the evidence base for the Local Plan. The appointed consultant will be expected to provide expert witnesses, if required and as necessary, at the Examination in Public for the Oldham Local Plan.

Section 4 & 5 will be evaluated on the basis of **the most economically advantageous** offer to the Council. The evaluation criteria and the associated weightings, which will be utilised in this assessment are: -

Technical Capacity	50% Weighting
Q1. 20%	
Q2. 20%	
Q3. 10%	
Social Value	5% Weighting
Price	45% Weighting

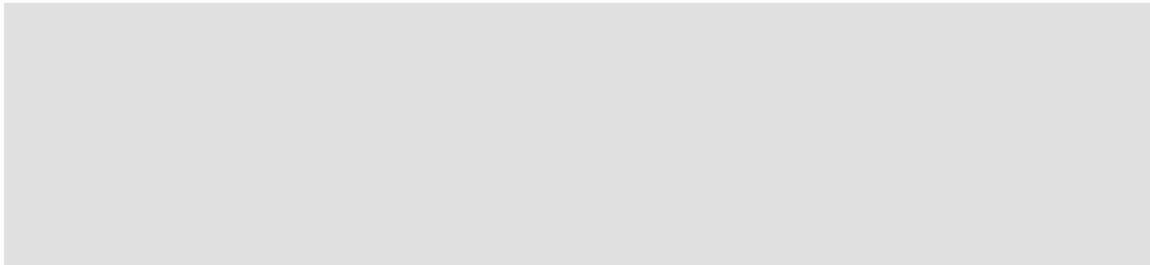
4.15 Submission

Your submission should take into account the weightings as outlined in the above table and will be marked in accordance with the marking regime outlined in Section 1.

4.16 Technical Capacity 50%

Q1. (20%) Please provide detail of your proposed project team set up, including experience. Please also outline roles and responsibilities for this project. (Please include a curriculum vitae for each project member)

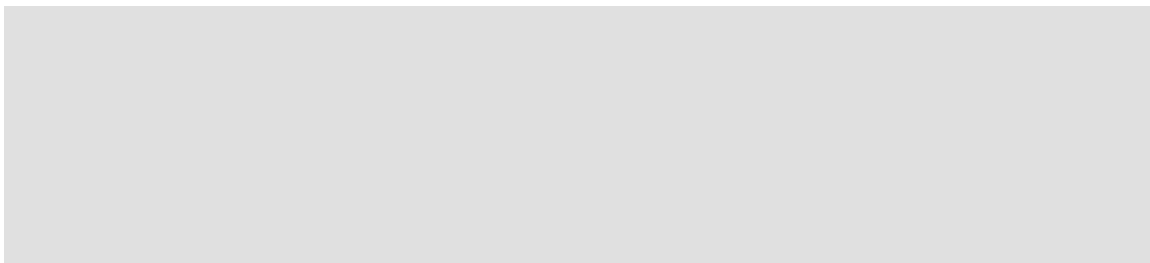
Maximum Points Available 10



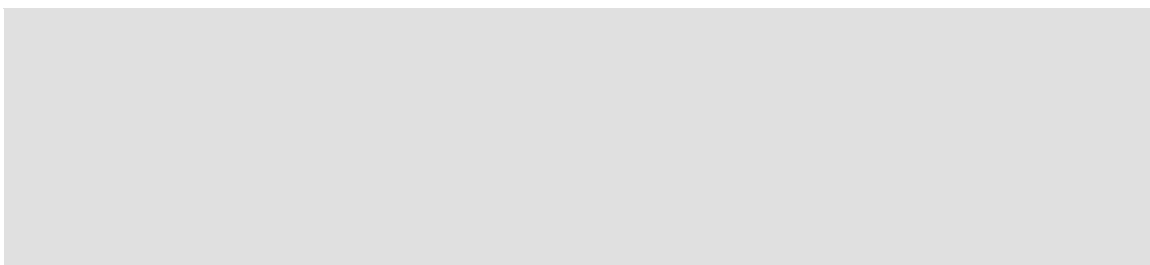
Q.2 (20%) Please provide a method statement for delivering the project aims and key tasks outlined in Sections 4.5 and 4.6 of the brief– please include additional detail of:

- compliance with the ‘Historic England Advice Note 1 Methodology as detailed at Section 4.7 of the brief
- compliance with the timetable and project milestones detailed at Section 4.9 of the brief

Maximum Points Available 10



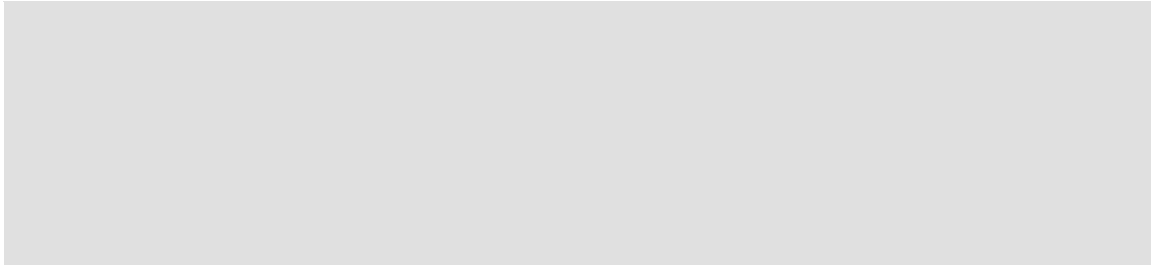
Q3. (10%) Please submit detail of your proposed Consultation Engagement Plan to include all aspects detailed at Section 4.8 of the brief. **Maximum Points Available 10**



Q4.Social Value 5%

X.X.X Please provide details of how your organisation will demonstrate social value in operation of this contract. (For more information please refer to the attachment – Social Value Procurement Framework)

Maximum Points Available 10



Section Five – Schedule of Costs and Undertaking

I/We the undersigned hereby offer to provide the goods and/or services described or referred to in this quotation documentation for the following costs, exclusive of value added tax:

The standard terms and conditions of Oldham Council will apply to all orders placed as a consequence of this process. For the avoidance of doubt, the Council's standard payment terms are thirty (30) days from receipt of valid and undisputed invoice: all submissions must be based upon these terms.

(All costs to be quoted in pounds sterling and exclusive of V.A.T.)

Fee Proposal

The fee for the work will be fixed in advance and include all expenses excluding VAT.

The quote should clearly set out and cover the following:

- A breakdown of the costs involved for the appraisal and management plan, including consultation requirements;
- Details of the key personnel fees involved, including a breakdown of the fees for each person undertaking the study; and

An overall budgeted fee for the total project.

The contract fee shall be payable to the contractor as follows:

- On completion of draft Conservation Area Appraisal and Management Plan reports: 40% of project cost
- On completion of consultation, followed by consideration of comments and final Conservation Area Appraisal and Management Plan reports: 60% of project cost

	Description of Goods/Services	UNIT COST (excl V.A.T) £ : p
1.		£
2.		£
3.		£
4.		£
5.		£
6.		£
TOTAL COST OF SERVICE		£

The above costs must include all travelling/subsistence, expenses and disbursements.

- i) Delivery period from receipt of order _____ days
- ii) Additional Volume / Turnover discount _____
- iii) State any other charges _____

I/We hereby offer to supply the above mentioned goods and/or services on the Council's Standard Conditions of Contract and confirm that we have read, understood and agree to be bound by the Council's Standard Terms and Conditions for all orders placed as a result of this quotation process.

Signed	
Name (Block Capitals)	
Designation	
For and on behalf of	