

ORDER NO / REFERENCE NO: Insert CPU reference number

COMPANY NAME: Tenderer to insert company name

DEPARTMENT / SECTION **CORPORATE SERVICES DEPARTMENT**

REQUEST FOR QUOTATION

PROVISION OF RETAINED RETAIL AND COMMERCIAL LEISURE CONSULTANCY ADVICE

RETURN OF QUOTATION

By post, courier or by hand in hard copy in plan envelope using the label provided

Return Address:
Forward Planning Section,
Strategic Development
Town Hall,
Brighton Street,
Wallasey,
Merseyside
CH44 8ED

Closing Date: 12.00 noon	Friday 7th May 2010
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CONTACTS

Your contact for this quotation is:	John Entwistle
Telephone:	0151 691 8221
Fax:	
Email:	johnentwistle@wirral.gov.uk



SCOPE

1. INTRODUCTION AND INSTRUCTIONS FOR COMPLETION

- 1.1 Wirral Council is inviting quotations from suitably qualified and experienced planning consultants to provide ongoing specialist advice on retail and commercial leisure planning matters affecting the Borough, as retained consultants to the Council. The appointment will be on an annually renewable basis but, subject to an annual review of performance, will be expected to run for a period of five years. The initial performance review would take place on 31 March 2011 and then on the same date thereafter for the remainder of the five year period to 31st March 2015.
- 1.2 Please complete the attached pricing schedule and declaration and submit a written statement of the other information required in this Request for Quotation.
- 1.3 Responses to the Request for Quotation should be returned by post, courier or by hand in hard copy, **in a plain envelope** using the enclosed label and bearing no name or mark that would indicate the identity of the sender, to be received at the Return Address set out above no later than 12 Noon on Friday 7th May 2010.
- 1.4 Prices quoted are to exclude VAT.
- 1.5 Please advise of any additional costs.
- 1.6 A minimum of two hard copies of the response to the invitation are to be submitted of which 1 copy must be unbound in loose-leaf form to facilitate further reproduction as required. Please also include a CD/electronic version.

2. BACKGROUND INFORMATION

Introduction to Wirral

- 2.1 Wirral is a peninsula of 60.35 square miles, which lies between the estuaries of the Rivers Dee and Mersey. The Borough has a population of 309,500 (ONS). 30 per cent of Wirral's population is under the age of 25 and 18 per cent are over 65. The majority of the developed area of the Borough lies along the Mersey coast and east of the M53. West of the motorway the Borough is comprised of suburban settlements, villages and towns separated by areas of Green Belt.
- 2.2 Birkenhead is Wirral's largest town, followed by Liscard. The two centres are separated by the Birkenhead Docks (part of the port of Liverpool), which have attracted important industrial development and are to be the focus of a significant new regeneration initiative – Wirral Waters, promoted by Peel Holdings, which is proposed to include substantial office, housing and retail/leisure development. Over the last decade Birkenhead has benefited from several major regeneration



schemes - City Lands, Hamilton Quarter, Lairdside and now Wirral Waterfront. The Borough has a number of out of centre superstores

and retail parks. The main industrial areas are found in the eastern half of the peninsula. Major industries are also based in Port Sunlight, Bromborough and Eastham. The principal challenge of the area is to maintain the regeneration of deprived communities while promoting the high quality of life in the Borough.

Current Development Plan Status

- 2.3 The current Development Plan for the Borough comprises the Wirral Unitary Development Plan for Wirral (adopted February 2000) and the Regional Spatial Strategy for the North West (adopted September 2008).
- 2.4 In terms of current LDF progress, a Statement of Community Involvement and four Supplementary Planning Documents have now been adopted. The Core Strategy is at Regulation 25 Stage and consultation on Spatial Options has just been completed. The Council aims to adopt the Core Strategy by mid-2011 and will then commence work on a Site Allocations DPD. A series of evidence base studies have been commissioned, including a Town Centres, Retail and Commercial Leisure study which was completed by consultants on behalf of the Council in December 2009. This includes health checks of the Borough's town and local centres, analysis of shopping patterns, assessment of need for future floorspace and a strategy and recommendations.
- 2.5 Full details on current progress with the LDF, can be found at

<http://wirral-consult.limehouse.co.uk/portal>

where all documents (including the Town Centres, Retail and Commercial Leisure study) are available for viewing and downloading.



SPECIFICATION

3. Purpose of the commission

3.1 The successful consultant will be appointed as the Council's retained retail consultants. The main element of the commission will be the provision of assistance with the assessment of retail and commercial leisure planning applications, assessment and response to objections submitted through the LDF preparation processes, and where necessary attendance as an expert witness on behalf of the Council at public inquiries.

3.2 Key tasks for the successful consultant will be responding to requests from Council officers for general advice on matters such as updates on planning policy developments, appeal decisions, expenditure forecasts and other relevant information relating to the consideration of planning applications and/or formulation of planning policy. This advice would normally be provided by telephone and/or email. It is proposed that any fees incurred would be paid by quarterly invoice as required on evidence of work completed. Your submission should set out indicative fee rates for this work.

The Council has made budgetary provision of up to £5,000 per year to cover the retained consultancy commission.

3.3 In addition, specific commissions (such as the auditing of planning applications, appearance at public inquiry), would be the subject of individual call-off instructions/purchase orders by the Council on an "as and when required" basis subject to an agreed fee (inclusive of all disbursements) charged and undertaken within the scope of this brief and the contract drawn up with the successful consultant. Unless otherwise agreed in advance, payment for specific commissions will be made following the satisfactory conclusion of the work and within 28 days of receipt of an invoice from the consultancy. For larger commissions, a staged payment arrangement will be proposed based on 20% on commencement, 20% at an agreed mid point, 30% on draft report, 30% on evidence of completion of the work. Your submission should also set out day rates for this work.

3.4 The fees for day to day advice and day work rates used to determine fees for specific commissions will be subject to an agreed inflation index to reflect increased costs for future years.

4. CONTRACT DETAILS

4.1 This engagement will be governed by a contract between Wirral Council and the successful supplier.

- 4.2 Wirral Council standard terms and conditions for the supply of services will prevail within this contract: these can be found at the end of this document. The purpose of standard terms is to ensure that all contractors tender on an equal basis and enable the Council to properly compare the tenders, since they have all been submitted on the same basis. You should study the terms and conditions carefully before deciding to respond to this request for quotation and signing the declaration at the end of this document. Responses to this request for quotation which are not accompanied by a signed declaration will not be able to be considered for short listing.
- 4.3 Both parties will have the right to terminate the arrangement by way of a formal exchange of letters. In such a situation, 3 months notice will be required on either side.

5. RESPONSES TO INVITATION

5.1 Responses to this invitation should include the following:

- In no more than 750 words demonstrate the consultant’s relevant experience and a proven track record of advising local authorities on retail planning matters. The consultant should confirm that they can work with and utilize the previously commissioned “Strategy for Town Centres, Retail and Commercial Leisure” as background evidence. It can be viewed at:

<http://democracy.wirral.gov.uk/ecSDDisplay.aspx?NAME=SD416&ID=416&RPID=194919&sch=doc&cat=12848&path=12848>

- Demonstrate that that the consultancy can meet the requirements of this brief from its in house resources; setting out the names and CVs of the lead consultant and all other staff who will be responsible for undertaking the work, together with a statement (of no more than 500 words) of their seniority, skills and experience. The consultancy should also be able to demonstrate that it has adequate specialist staff resources to ensure continuity of retail advice in the event that nominated lead and key officers leave the company;
- The fee proposal and arrangements (complete the pricing schedule below)
- Details of the firm’s equal opportunity policy;
- Details of the firm’s commitment to quality management and whether or not it is ISO 9001 accredited; and
- Details of the firm’s professional indemnity insurance.

You should additionally complete the compliance table below

Compliance table	Yes/No
Confirm that the consultancy can operate from an office based in the North West of England	
Confirm that there will no conflict of interest, either now or for the duration of the contract, with other clients who may be advised by the consultancy	



Confirm that the consultancy is familiar with and be able to work with the MapInfo GIS system, as much of the background data is held in this way	
Confirm that the consultancy is able to handle and use documents in MS Office format	
Confirm that the consultancy is able to comply with the corporate policies of the Council	

6. PAYMENTS

6.1 Wirral Council will not be liable for any costs incurred in the preparation of responses to this Request for Consultation and will not be bound to accept the lowest or any quotation.

7. SELECTION

7.1 Successful respondents may be invited to an interview panel which - if required - will take place during the week beginning 10th May 2010. Respondents should ensure that the key personnel who will form part of the project team are available to attend. Assessment will be based on all the requirements set out in the brief and evaluated on a 60% technical and 40% financial basis. The technical assessment will be based on the factors set out in section 5, while the financial assessment will be based on value for money. The Council will not necessarily appoint the on the basis of the lowest cost submission.

8. TIMETABLE

8.1 The key dates envisaged for this project are outlined below. A relatively short time frame is envisaged:

- Invitation to quote - XX^h April 2009
- Submission of responses – by **Noon Friday 7th May 2009**
- Short listing/interviews week beginning 10th May 2010
- Confirmation of appointment – 17th May 2010



PRICING SCHEDULE

Please insert your fees in the section below; Fees should be stated for all staff identified in the consultants submission. Fees should be inclusive of expenses and exclusive of VAT

	Cost Per Hour £	Total Number of Hours	Total Cost £
Project Manager			
Senior Consultant			
Project Assistant			
Others (specify)			
Total Costs of Consultants	£		



DECLARATION

I/We the undersigned, hereby quote to supply the goods/services detailed in this Request for Quotation and specification.

I certify that as far as I know, the information I have supplied is accurate.

I/We agree that this quotation shall remain open to be accepted or not by the Council for a period of six weeks from the closing date for the receipt of quotations.

I/We hereby offer to supply the goods/services at the respective prices quoted, (prices include carriage but will exclude VAT), at the date of delivery stated. This is in accordance with Wirral Borough Councils terms and conditions of contract. A copy of these may be obtained from: www.wirral.gov.uk/tendersandcontracts

I/We certify that I/We have not now or will in the future, canvassed or solicited any member, officer or employee of the council and any other companies in the group of which the council forms part, in connection with this quotation and that to the best of our knowledge and belief no person employed by me/us or acting on my/our behalf has done such an act.

The quotation submitted herewith is a bona fide tender intended to be competitive.

We have not fixed or adjusted the amount of the quotation by or under or in accordance with any collusive agreement or arrangement with any other person.

NAME OF CONTACT:	
DESIGNATION:	
COMPANY NAME:	
ADDRESS (including postcode)	
TELEPHONE:	
FAX:	
EMAIL:	
SIGNATURE:	
DATE:	

