



PROJECT BRIEF

West Surrey Strategic Housing Market Assessment

March 2014

COMPANY INFORMATION

1.1	Trading Name & Address	

1.2	Address for Correspondence Relating to this Application: (If different to 1.1)	

1.3	Contact Name:	
	Position in Company:	
	Telephone Number:	
	Fax Number:	
	Email Address:	
	Mobile Phone Number:	

1.4	Company Website:	
-----	------------------	--

1.5	Company Status:	<i>Please Indicate</i>
	Sole Trader	Yes / No
	Partnership	Yes / No
	Limited Company	Yes / No
	Public Limited Company	Yes / No
	Charity	Yes / No
	Other (please specify)	

1.6	Date of Formation or Registration:	
-----	------------------------------------	--

1.7	Registration Number:	
	Registered Address:	

1.8	VAT Number:	
-----	-------------	--

1. Introduction

- 1.1 Guildford, Waverley and Woking Borough Councils are seeking to commission a service provider (“the consultants”) to provide a Strategic Housing Market Assessment (SHMA) for the three boroughs comprising the West Surrey Housing Market Area. This should draw together the findings of the recently produced draft Guildford and Waverley SHMAs and provide one SHMA for the whole housing market area incorporating Woking.
- 1.2 This should provide up-to-date evidence of the objectively assessed local need for both affordable and market housing in line with the requirements of the National Planning Policy Framework (NPPF) and other government guidance.

2. Background

- 2.1 In 2007 Waverley, Guildford and Woking Borough Councils jointly commissioned Fordham Research to undertake a SHMA. The [West Surrey SHMA](#) was subsequently published in February 2009.
- 2.2 Guildford and Waverley Borough Councils have recently published updated draft Strategic Housing Market Assessments for their respective boroughs. Both have identified the Housing Market Area to still comprise Guildford, Waverley and Woking.
- 2.3 The [Waverley Draft SHMA](#) was carried out by GL Hearn and was published in October 2013.
- 2.4 The [Guildford Draft SHMA](#) was also carried out by GL Hearn and was published for a period of public engagement in February 2014.
- 2.5 The original decision to produce a SHMA in 2009 by Waverley Guildford and Woking was based on information from the Regional Housing Board and the South East Plan, which established that Waverley, Guildford and Woking form a housing market area. However, the Councils also acknowledge that the local housing market is more complex than this. This has already been considered in some detail in Waverley and Guildford draft SHMAs.

3. NPPF Requirements

- 3.1 The overriding objective is to produce an updated SHMA that identifies the objectively assessed need for housing in the Housing Market Area in accordance with the NPPF. The draft Guildford and Waverley SHMAs have identified the HMA to comprise of Guildford, Waverley and Woking. The new SHMA should cover the period up to 2031.
- 3.2 Paragraph 47 of the NPPF says that local planning authorities should use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing in the housing market area, as far as is consistent with policies in the NPPF.

3.3 Paragraph 159 of the NPPF gives specific details of what a SHMA should include. It says:-

“Local planning authorities should have a clear understanding of housing needs in their area. They should:

- prepare a Strategic Housing Market Assessment to assess their full housing needs, working with neighbouring authorities where housing market areas cross administrative boundaries. The Strategic Housing Market Assessment should identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which:
 - meets household and population projections, taking account of migration and demographic change;
 - addresses the need for all types of housing, including affordable housing and the needs of different groups in the community (such as, but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes); and
 - caters for housing demand and the scale of housing supply necessary to meet this demand;”

3.4 It is expected that the methodology used to carry out the study will address the above national requirements.

4. Other Government Guidance

4.1 The SHMA should be produced in accordance with relevant Government guidance and should include a section demonstrating how the SHMA meets this guidance. Guidance on the production of SHMAs is set out the National Planning Practice Guidance published in final format in March 2014.

5. Best Practice

5.1 The Councils also expect there to be evidence that the SHMA accords with current best practice, including any specific advice from the Planning Advisory Service (PAS). Best practice may also include considering the form and content of any SHMAs that have been produced since the introduction of the NPPF and have supported the delivery of ‘sound’ Local Plans.

6. Requirements

The consultant will be required to:

- propose a robust, transparent and credible methodology that can withstand scrutiny at examination
- define the extent of the housing market area in a consistent way to those in the wider housing market area
- identify, if appropriate, sub-markets within this area

- involve all key stakeholders, including house builders, registered social and local councils to ensure an appropriate level of buy-in and consistency in approach
- include a full technical explanation of the methods employed, with any limitations noted, and clearly document all data sources to be used
- justify all assumptions, judgements and findings in an open and transparent manner
- explain and justify the use of primary data as appropriate to help supplement the findings
- include all necessary data and analysis:
 - relevant market and economic signals (paragraph 158, NPPF)
 - household and population projections, taking account of migration and demographic change (paragraph 159, NPPF)
 - distinction between housing need and demand
 - existing characteristics and trends within the HMA
 - the relationship and strength of linkages with adjacent HMAs
- present the key findings both for each authority and the HMA as a whole

Current Housing Market

The SHMA should estimate the current dwelling stock in terms of size, type, condition and tenure. It should provide an analysis of past and current housing market trends, including the balance between supply and demand in different housing sectors and affordability. The study should describe the key drivers underpinning the housing market.

7. Affordable Housing

- 7.1 The SHMA should provide up-to-date information on the need for affordable housing within Guildford, Waverley and Woking. This should be in the context of relevant guidance and legislation. The Study should analyse the affordability of different categories of affordable housing (social rented, shared ownership/shared ownership and affordable rent) and consider the extent to which each type/tenure can contribute to meeting local housing needs.

8. Housing for Specific Groups

- 8.1 The Study should consider the specific housing needs of different groups in the community as stated in paragraph 50 and 159 of the NPPF. These groups will include:
- Older people
 - People with disabilities
 - Black and Minority Ethnic (BME) households
 - Households with children
 - Young people
 - Students
 - People wishing to build their own homes
 - Service families

- Travellers (All the authorities have published or about to publish their TAAs in accordance with an agreed Surrey-wide methodology. The study should cross reference to them rather than do another TAA.

9. Contents of Proposal

- 9.1 **Assessment of work to be undertaken.** In the light of the information provided and your organisation's experience of similar assignments, please provide a short summary and assessment of the work you consider to be required to fulfil this assignment within the timescales set out in the Project Brief. You are invited to draw to the Councils' attention any tasks that you consider to be necessary and relevant in order to achieve the successful completion of the work to the timescales indicated in this brief.. You will be required to set out a clear methodology for carrying out the study. In particular, the methodology should ensure a consistent use of base line data to enable comparisons to be made where relevant.
- 9.2 **Personnel Nominated.** Please give details of the consultant(s) who will be undertaking the work. The personnel nominated by the appointed organisation to undertake any work in connection with the proposed assignment should be suitably skilled, qualified and experienced with a thorough knowledge of the work required. Please would you provide the curriculum vitae of the lead consultant who will be managing the assignment and that of any other consultant who will be involved in this assignment?
- 9.3 **Fees.** Please provide details of your proposed fees for the production of the SHMA and requirements set out in this brief on a fixed price or capped basis with supporting hourly or daily rates to show how many hours'/days' work would be involved and how the fixed or capped price was calculated. Fees should be in pounds sterling and fully inclusive of all costs and disbursements, but exclusive of VAT, and all expenses including the following:-
- 9.3.1 All staff / personnel time based on your detailed assessment of the identified tasks of the assignment.
- 9.3.2 All travelling subsistence and "out of pocket" expenditure incurred in connection with the work.
- 9.3.3 All stationery, telephone and other ancillary office services.
- 9.3.4 The provision of all reports and other deliverables.
- 9.3.5 A per diem fee, whereby the consultant will receive a fixed payment for each hour or day of service provided, if required. Again, the fee must be exclusive of VAT and inclusive of all expenses and disbursements.
- 9.3.6 Please state whether the price is fixed or capped and whether VAT would be chargeable.
- 9.3.7 A proposed schedule of payments for services undertaken.

9.4 **References.** Please supply the names and contact details of at least two referees relating to similar assignments previously undertaken by your organisation.

9.5 **Data Protection.** The written quotation must contain details of the consultant's data protection policy and practices, and confirmation that consultant's team members are trained in relation to data protection and confidentiality, and that the consultant recognises that breach of confidentiality is not acceptable.

9.6 **Health and Safety.** The written quotation must contain information relating to health and safety working policy and practices.

10. Terms and Conditions of Submission

10.1 This invitation to provide a proposal and all accompanying documents and other relevant information should be treated as private and confidential. Details of this invitation should only be released on an "in confidence" basis to other professional advisors who have a legitimate need to know.

10.2 The Councils does not bind itself to accept the lowest or any proposal. The Councils will take into account not only the price proposed, but also all the information submitted, in order to form a view as to which submission is the most economically advantageous to the Councils.

10.3 Submissions should be submitted on the basis that the offer shall remain in force for a minimum period of 60 days from the date fixed for receipt of submissions.

10.4 The Councils will not be responsible for any costs incurred by any person in preparing and submitting a written response or attending for interview.

10.5 The Councils reserve the right to reject any submission, which does not comply with this invitation.

11. Terms and Conditions of Contract

11.1 The standard terms and conditions of Guildford Borough Council together with Special Conditions (if any) will apply to all orders placed as a consequence of this process. To view the standard terms and conditions go to Appendix 1.

12. Insurance

12.1 The appointed organisation is required to maintain at his own cost throughout the period of the contract sufficient policies of professional indemnity and other insurance to cover the liability of the organisation and its personnel in respect of any matter for which they may become liable to indemnify the Councils under the terms of the contract and in the case of professional indemnity

insurance to provide the same for a minimum of 6 years after the completion of the assignment.

- 12.2 The appointed organisation shall submit documentary evidence of complying with this requirement, with its proposal. See Appendix 1 for details.

13. Data Protection Act 1998

- 13.1 Under the terms of the Data Protection Act 1998, the project includes the processing of personal data. In accordance with the Act the data controllers will be the Council and the data processor will be the consultant. All of the personal data processed must be treated as confidential and only used for the purposes outlined in this project brief and only shared with the relevant Council officers listed in section 1 above.

- 13.2 Any personal data collected and processed by the consultant under the terms of this project brief must not be disclosed to any third party without the written permission from the client on behalf of the Council. The consultant must take all necessary technical and organisational measures to ensure the security of the personal data against any unlawful or unauthorised processing. The Council will retain ownership of all the personal data collected, processed, and as soon as the contract ends the consultant must return all 'hard copy' files containing personal information to the Council. The consultant will not be permitted to retain personal data processed under this project brief in any format once the agreement has ended.

- 13.3 The consultant shall comply with the Data Protection Act 1998 and all linked subordinate legislation.

14. Conflict of Interest

You are required to let us know in your submission if there is any conflict of interest with any other parties that could affect you carrying out the Waverley Strategic Housing Market Assessment.

15. Additional Work

- 15.1 The Councils involved may also require expert witness support at Examination of the Local Plans in relation to the methodology and findings of the Strategic Housing Market Assessment. The additional cost of this support should be identified in the proposal.
- 15.2 The Councils may require the consultant to present the findings of the report to Councillors. The additional cost of this support should be included in the proposal.

16 Project Outcomes

- 16.1 The Councils will expect a written report of the outcome of the study. This should be sent in an electronic format. The electronic data format of the

information provided must be compatible with existing computer software used by the various authorities and must be approved by the Councils. Text should be available in Microsoft Word format, photographic images in JPEG format, maps and plans in pdf and JPEG format, with hyperlinks where appropriate. Nine hard copies of the report should also be provided, three for each of the authorities.

- 16.2 The consultants may be required to do a presentation of the findings of the study to Members and Officers of each of the Councils.

17 Consultation

- 17.1 The methodology for the SHMA should be agreed with the local planning authorities to ensure that it is consistent with or takes account of the SHMAs carried out for Waverley and Guildford by GL Hearn, the NPPF and accords with current best practice.
- 17.2 The consultants should also seek the views of relevant key stakeholders to establish a clear view of the local market conditions for housing demand, supply and pricing.

18 Work Programme

- 18.1 The following sets out the key dates for undertaking the work.

Task	Deadline
Appoint consultants	14 March 2014
Inception Meeting	w/c 17 March 2014
Woking to provide primary data to consultants on housing needs register, etc	21 March 2014
Consultants to provide Draft Report	16 May 2014
Stakeholder Engagement Event/s	May 2014
Final Report	6 June 2014

19. Timescales for Submissions

If your organisation is interested in submitting a proposal, please send it to paul.falconer@waverley.gov.uk no later than **5pm on 12th March 2014.**

20. Specification

The client team are as follows;
 Clients: Graham Parrott, Waverley Borough Council; Ernest Amoako, Woking Borough Council; and Carol Humphrey, Head of Planning Services, Guildford Borough Council.

21. Contacts

21.1 For further information or to discuss any part of this brief please contact Paul Falconer at Waverley Borough Council.

Guildford Borough Council	Waverley Borough Council	Woking Borough Council
Laura Howard 01483 444626 Laura.Howard@guildford.gov.uk Planning Services Guildford Borough Council Millmead Guildford Surrey GU2 4BB	Paul Falconer 01483 523417 paul.falconer@waverley.gov.uk Planning Services Waverley Borough Council The Bury Godalming Surrey GU7 1HR	Tracey Haskins 01483 743477 tracey.haskins@woking.gov.uk Planning Services Civic Offices Gloucester Square Woking Surrey GU21 6YL

SCHEDULE OF PRICES

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

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

	Production of a new Strategic Housing Market Assessment (SHMA)	UNIT COST (excl V.A.T) £ : p
1.		£
2.		£
TOTAL COST OF SHMA		£ :

The above costs must include all travelling/subsistence expenses applicable to this contract.

- i) Settlement Terms _____
- ii) Delivery period from receipt of order _____ days
- iii) V.A.T. _____ %

I/We hereby offer to supply goods and/or services as specified in the Price Schedule in accordance with the Council's Conditions of Contract and/or Special Conditions contained in this enquiry. All costs associated with the delivery of this contract are detailed above and will remain fixed for the contract duration.

Please refer to the attached Service Specification/Project Brief for further details of the services required under this contract.

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