



CABINET – 9TH SEPTEMBER 2020

**SUBJECT: CAERPHILLY HOMES INNOVATIVE DEVELOPMENT PROPOSALS
– LLANFABON DRIVE, TRETHOMAS; THE CRESCENT,
TRECENYDD & OAKDALE COMPREHENSIVE SCHOOL**

REPORT BY: CORPORATE DIRECTOR - SOCIAL SERVICES AND HOUSING

1. PURPOSE OF REPORT

- 1.1 The purpose of the report is to inform Cabinet of the work undertaken to date with Willmott Dixon to increase the number of affordable homes for social rent within Caerphilly Homes' portfolio. The work has focused on bringing innovation, scale and momentum to an ambitious desire by the Council to deliver 400 homes by 2025.
- 1.2 The report seeks approval from Members to formally engage Willmott Dixon via the SCAPE OJEU compliant framework to deliver a new, Caerphilly made, bespoke housing solution at The Crescent, Trecenydd; Llanfabon Drive, Trethomas and the former Oakdale Comprehensive School site on behalf of Caerphilly Homes.
- 1.3 The report also seeks approval to apply for funding from the Welsh Government's Innovative Housing Programme for two of the three sites noted above as pilot or demonstrator sites (The Crescent, Trecenydd and Llanfabon Drive, Trethomas).

2. SUMMARY

- 2.1 In order to bring scale, pace and momentum to the Council's ambition to deliver 400 new homes between 2020 and 2025 and deliver against the commitment to ensure that Caerphilly is a zero carbon borough by 2030, officers have been working closely with Willmott Dixon via the SCAPE framework.
- 2.2 SCAPE is an OJEU compliant framework which permits the Council to enter into a collaborative arrangement via an NEC contract with Willmott Dixon who tendered for and won the major works element of the SCAPE framework and who can deliver works on behalf of clients with a value of between £2m and £20m.
- 2.3 One of the key benefits of engaging a construction partner via the Framework is the fact that all the initial, up front feasibility work is undertaken free of charge. It is only when clients are satisfied that the feasibility work confirms that a site is viable, you proceed to the next stage entitled 'pre-construction' and enter into a formal, fee incurring contract arrangement.

- 2.4 Willmott Dixon have completed feasibility studies on both Llanfabon Drive, Trethomas and The Crescent, Treceynydd. A high level outline feasibility study has been completed on the former Oakdale Comprehensive School site.
- 2.5 The Crescent, Treceynydd and Llanfabon Drive, Trethomas are both sites that fall within the Council's Housing Revenue Account (HRA). The former Oakdale Comprehensive School site falls within the Council's General Fund and as a result the acquisition of the site must be apportioned at the rate determined by the District Valuer.
- 2.6 All studies indicate that each site is viable for development and Officers are at the point where a formal contract arrangement must be entered into in order for Willmott Dixon to start the detailed investigations and surveys required on all three sites. This phase of the SCAPE Framework, known as 'pre-construction' will enable Willmott Dixon to undertake the survey and design work necessary to provide a detailed cost profile before the Council commits to progressing the schemes to the next phase, known as the 'development contract' phase.
- 2.7 The estimated cost of the 'pre-construction' phase is £814k for all three sites.
- 2.8 To date, the feasibility and research and development work undertaken by Willmott Dixon has been delivered free of charge.
- 2.9 The mandate at the outset of the discussions with representatives from Willmott Dixon was to deliver high quality, energy efficient, healthier, accessible and flexible homes that would support the circular and foundational economies, mitigate the effects of climate change and create new opportunities for skills development, training and employment.
- 2.10 Taking these requirements on board, Willmott Dixon have worked closely with Caledan Ltd, based on Penallta Industrial Estate, to develop an innovative and climate resilient steel framed product that is sourced locally and delivers a Passivhaus, non-combustible envelope solution ensuring that any new social rented homes achieve optimum energy efficiency, create a healthy internal environment, develop beautiful places and deliver lower running costs for tenants.
- 2.11 On 30 July, Welsh Government launched the fourth year of the Innovative Housing Programme (IHP) which has a Modern Methods of Construction (MMC) focus. Caerphilly Homes has not been able to apply for funding from this fund previously due to the focus on completing WHQS and the absence of a development programme. There is now an opportunity for Caerphilly Homes to apply for funding of up to 58% towards the costs of progressing the two demonstrator sites and up to 100% of the costs associated with the additional costs of innovation.
- 2.12 The deadline and process for the submission of a funding application is challenging with an expectation from Welsh Government that eligible schemes will be submitted for consideration by the Design Commission for Wales late August and Early September and that applications will be submitted by 25 September.
- 2.13 The IHP requires signed build contracts to be in place by 5th March 2021 and schemes to start on site no later than 30th April 2021.
- 2.14 As a result, urgent approval is now sought to take this work to the next stages of the SCAPE framework which is the pre construction phase for the former Oakdale

Comprehensive School site, The Crescent, Trecenydd and Llanfabon Drive, Trethomas at an estimated cost of £814k.

- 2.15 Approval is also sought to take The Crescent, Trecenydd and the Llanfabon Drive, Trethomas sites through to full planning and thereafter development at a cost of £3.7m. A further report will be brought forward to Cabinet following the pre-construction work on the Oakdale site prior to the next, development contract phase being entered into.
- 2.16 Approval is also sought to apply for funding from the Welsh Government's Innovative Housing Programme for the pre-construction and development contract phases of the SCAPE framework relating to The Crescent, Trecenydd and Llanfabon Drive, Trethomas. The Oakdale site will not be eligible for this grant funding as it is not anticipated to be developed for affordable housing only which is a key requirement for the grant award.
- 2.17 All three schemes will be subject to planning and SAB requirements. A pre-application process is underway for both the Trecenydd and Trethomas sites
- 2.18 The HRA has included building development in its portfolio and proposals have been submitted in the 2020/21 Housing Business Plan, which at the time of submission, confirmed that the HRA remained viable and the borrowing requirement, affordable. This was submitted prior to the Covid-19 pandemic.

3. RECOMMENDATIONS

- 3.1 Cabinet approve the move to the pre-construction phase of the SCAPE Framework for The Crescent, Trecenydd, Llanfabon Drive, Trethomas and the former Oakdale School sites at a cost of £814k.
- 3.2 Cabinet approve the move from the pre-construction phase of the SCAPE Framework through to full planning and into the development phase for The Crescent, Trecenydd and Llanfabon Drive, Trethomas sites at an estimated cost of £3.7m.
- 3.3 Cabinet approve the submission of an IHP funding proposal to finance up to 58% of the costs associated with the pre-construction and development of the Trecenydd and Trethomas sites and up to 100% of the innovation related costs.

4. REASONS FOR THE RECOMMENDATIONS

- 4.1 To deliver the ambition of delivering 400 new social homes between 2020 and 2025.
- 4.2 To address the shortage of affordable homes through the development of approximately 120 new social rented homes for people on the waiting list and contribute towards addressing homelessness.
- 4.3 To support the recovery of the local economy post Covid-19 through the construction and the delivery of new social homes thereby acting as a catalyst to support the circular and foundational economies creating new opportunities for skills development, training, apprenticeships and employment and improving the overall health, wellbeing and resilience of some of the Council's most vulnerable residents.

- 4.4 Add value to the Council's place making ambitions through the creation of new communities and beautiful places.
- 4.5 To apply for funding from the Welsh Government's Innovative Housing Programme (IHP) to support the delivery of the Council's development programme.
- 4.6 To mitigate the effects of climate change and deliver against the Council's ambition to ensure Caerphilly is a zero-carbon authority by 2030.
- 4.7 To address fuel poverty and support the delivery of healthier, more flexible homes that enable people to live in their homes safely, for longer.

5. THE REPORT

- 5.1 The purpose of the report is to inform Cabinet of the work undertaken to date to increase the number of affordable homes for social rent within Caerphilly Homes' portfolio, to obtain approval to move forward to the next stage of development and to seek urgent approval to submit an application to the Welsh Government's Innovative Housing Programme for funding to support development on two sites.
- 5.2 The work undertaken to date has focused on bringing innovation, scale and momentum to an ambitious desire by the Council to deliver 400 homes by 2025.
- 5.3 In order to help achieve this aim, a range of options were explored including the undertaking of a full OJEU procurement to appoint a preferred construction partner and/or the use of existing construction related frameworks.
- 5.4 To bring momentum and innovation to the delivery of new affordable homes, it was determined that the engagement of a private sector construction partner would be most efficiently sought via the use of a framework. Whilst all other frameworks stipulated the need to undertake a mini competition or required an upfront commitment to proceed, the SCAPE framework offered Caerphilly Homes the opportunity to work collaboratively with a private sector partner who would undertake feasibility studies on specific sites without any up front financial or contractual commitment.
- 5.5 The Scape Group who are responsible for overseeing the effective delivery and implementation of the Scape Framework are a Public Sector partnership made up of the following organisations:
 - Bedford Borough Council
 - Derby City Council
 - Derbyshire County Council
 - Gateshead Metropolitan Borough Council
 - Liverpool City Council
 - North Somerset Council
 - Nottingham City Council
 - Nottingham County Council
 - South Yorkshire Police
 - Warwickshire County Council
- 5.6 The Scape National Construction Framework is effectively a two stage process; the first, a fully compliant OJEU/Public Contracts Regulations process to select best value by means of a rigorous process and which establishes highly competitive rates

for overhead, profit, people and equipment costs. The rates are attractive because there is a no need for potential delivery partners to bid for these elements again for each project and there is a very good chance of an ongoing work stream, which saves the delivery partners considerable administrative and marketing costs.

- 5.7 Each delivery partner appointed onto the framework including, Willmott Dixon are also bound by Key Performance Indicators, the principal being social value, with, amongst other initiatives, the need to deliver locally where possible, thus ensuring that money spent goes back into the local community.
- 5.8 The Scape Group have worked collaboratively with their partners to create a number of different framework agreements that are available and free for use by other organisations.
- 5.9 Any contractor awarded business off the framework pays a percentage of the overall cost of that contract to the Scape Group to cover management costs.
- 5.10 The Framework is split into regional lots. Under the 'National Construction Framework Wales Major Works' framework, Willmott Dixon are the SCAPE delivery partner for projects costing between £2-£20m. The framework has a cumulative value of £500m and expires on 31 May 2021 but has been extended to September 2021.
- 5.11 Under the framework, clients have the opportunity to nominate preferred suppliers and can expect 3 quotes across all works packages as standard. Projects are subject to a rigorous performance management regime which requires the highest standards of customer satisfaction, local labour and spend. The pre-tendered costs are then applied to the market tested costs. This is a fully collaborative, open book, process with the client and consultancy team, who all work together to meet the target and will include Value Engineering and Risk Management as required. Accordingly, this is a fully competitive process from inception of the Scape OJEU tender, right through to completion.
- 5.12 Projects also operate with strict minimum standards of fair payment, waste diversion, community engagement, training and apprenticeships.
- 5.13 The SCAPE framework is an NEC contract and is based on the spirit of collaboration.
- 5.14 All relevant officers have benefited from SCAPE NEC contract training provided via the SCAPE Group.
- 5.15 Each project is also overseen by a Regional SCAPE Manager who also provides advice and support to users of the framework.
- 5.16 The SCAPE process applicable to Major Works is detailed in appendix 1.
- 5.17 Caerphilly Homes have worked in partnership during the last 9 months with Willmott Dixon via the SCAPE framework to not only examine the feasibility of development on three sites (Llanfabon Drive, Trethomas, The Crescent, Trecenydd and the formal Oakdale Comprehensive School site) but to also to develop an innovative and climate resilient steel framed product that is sourced locally and delivers a Passivhaus, non-combustible envelope solution ensuring that any new social rented homes achieve optimum energy efficiency, create a healthy internal environment, develop beautiful places and deliver lower running costs for tenants.

- 5.18 Adopting manufacturing principles Willmott Dixon have developed a “kit-of-parts” that can be adapted to site conditions and daylight orientation. It’s designed with the circular economy in mind – make, use, re-use, hence the choice of steel. Each panel will be asset tagged and will be capable of being disassembled and reassembled into a different configuration at some future point.
- 5.19 The use of a MVHR (Mechanical Ventilation with Heat Recovery) system provides a low moisture stable, clean and fresh air environment supporting health and wellbeing
- 5.20 The steel frame, developed locally with Caledan Ltd, who are based on Penallta Industrial Estate, is thought to be the first steel framed kit, Passivhaus certified product of its type.
- 5.21 Caerphilly Homes are currently at the conclusion of the feasibility stage (no cost and no commitment) of the SCAPE process and are seeking approval to move into the next phase of the process entitled, ‘pre-construction’. The pre-construction phase is where the detailed site investigations and surveys are undertaken in order to produce a more accurate construction cost profile.
- 5.22 Willmott Dixon have produced a feasibility report and an addendum document which provides a high level indication of the costs that may be involved in the development of each site but there is a need now to better understand the detailed costs involved in order to proceed into the ‘development agreement’ phase which could see the start of construction on site. A copy of the feasibility report produced by Willmott Dixon is attached as appendix 2. The addendum document which provides a high level overview of the pre-construction and development costs for the former Oakdale Comprehensive School site is attached as Appendix 3.
- 5.23 On the 30th July 2020, Welsh Government launched the Innovative Housing Programme (IHP) which has presented the Council with an opportunity to apply for funding of up to 58% of the pre construction and development costs likely to be incurred in progressing The Crescent, Trecenydd and Llanfabon Drive, Trethomas through to development together with up to 100% of the costs associated with the innovation aspects of the proposal.
- 5.24 The timescale for the submission of an application for funding is challenging and details were not known by officers until the launch on the 30th July 2020. Welsh Government expect all applicants to undertake a design review with the Design Commission for Wales prior to the submission of a funding application by 25 September 2020. Welsh Government will also require Caerphilly Homes to evidence Cabinet approval and support for the submission.
- 5.25 Build contracts are expected to be signed by 5th March 2021.
- 5.26 A start on site is required no later than 30th April 2021.
- 5.27 Moving into the next phase will require Caerphilly Homes to sign an ‘Pre Construction Services Delivery Agreement’ which commits Caerphilly Homes to incur the costs associated with more detailed site investigations and surveys in order to obtain a detailed cost profile for each site. IHP will require the pre-construction information and a commitment to the development of both, The Crescent, Trecenydd and Llanfabon Drive, Trethomas. This will require the signing of a ‘Development Contract’.

- 5.28 The total cost for the pre-construction work on the Trecenydd, Trethomas and Oakdale sites is £814,000.
- 5.29 The development costs for the Trecenydd and Trethomas sites combined are estimated to be £3,761,673.77. The average unit cost for the two combined is estimated at £188,083.68.
- 5.30 There is potential, if successful, to secure at least 58% of the cost of pre-construction and development from the Innovative Housing Programme.
- 5.31 At this stage, Officers are seeking approval to progress the pre-construction and development of the Trecenydd and Trethomas sites in order to submit an application for IHP funding and approval to progress the pre-construction of the Oakdale Comprehensive School site.
- 5.32 The former Oakdale Comprehensive School site will be the subject of a further Cabinet report once the pre-construction phase has been undertaken and a detailed cost profile determined.
- 5.33 It is important at this stage to reflect on what Caerphilly Homes are setting out to achieve and determine how we define 'value'. Neighbouring authorities have already tested out a variety of Passivhaus certified products and all have confirmed that there are significant up front construction costs largely resulting from the fact that these products are precision manufactured in a factory setting using environmentally sensitive and highly energy efficient materials thereby delivering a better quality, energy efficient, healthier environment for those who will eventually live in these homes. The construction costs which are thought to be between 20% and 30% more than those incurred on a traditional build are balanced by a more efficient construction method on site and therefore, the opportunity to obtain a rental income more quickly. In addition, tenants will have lower annual energy costs, will be more likely to live at home independently for longer and in a healthier environment thereby lessening the pressure on social services and primary health care.
- 5.34 The initial high development costs are offset against the whole life costs of the development including, the ability to build quickly and obtain a rental income, lower utility costs for tenants, lower maintenance costs, the improved health/wellbeing of tenants, positive environmental impacts, the opportunity to create employment, the potential to upscale for other sites and contribute towards a post Covid-19 economic recovery etc. Willmott Dixon have confirmed that tenants could receive energy bills of up to £100 per year as a result of the 'fabric first' technology embedded within the home. thereby helping reduce fuel costs for some of our most vulnerable tenants.
- 5.35 The development of the two smaller sites will deliver 20 new, social rented homes that will form part of the Caerphilly Homes stock portfolio. The development of both sites will be regarded as a pilot / demonstrator project.

Timescales

- 5.36 The programme proposed by Willmott Dixon is outlined on page 15 of the feasibility study. However, due to the pressing IHP deadlines, Willmott Dixon have confirmed that they can deliver against the following timescales:

Milestone Activity	Date
Issue Design Information for Review	11.09.2020
Design Commission for Wales Review	16.09.2020

Submission of IHP application	25.09.2020
Pre application pack issued for consultation	05.10.2020
Submit full planning application (both sites)	24.11.2020
Anticipated planning approval (both sites)	16.02.2021
Issue final contract sum for approval to Caerphilly CBC	26.02.2021
Issue draft building contracts	26.02.2020
Sign building contracts	05.03.2021
Start on site no later than	30.04.2021

Conclusion

- 5.37 The launch of the IHP presents Caerphilly Homes with an opportunity to take full advantage of the funding made available by Welsh Government to support the housing sector and to deliver a Caerphilly made, bespoke, innovative housing solution that will deliver lasting benefits and contribute towards the key ambitions of delivering more social homes, mitigating the impact of climate change and addressing fuel poverty.
- 5.38 It will also act as a catalyst to kick start the Council's ambition to deliver 400 new social rented homes by 2025, thereby creating new opportunities for skill development, apprenticeships, training and employment.
- 5.39 Cabinet support and approval is therefore sought to progress the sites noted within the report to the next stage.

6. ASSUMPTIONS

- 6.1 The deadline for the submission of an application to the Welsh Government under the Innovative Housing Programme is known and therefore no assumptions have been made in this regard.
- 6.2 Willmott Dixon have confirmed that they are able to meet the delivery timescales and grant funding deadlines.
- 6.3 It has been assumed that there will be no major delays resulting from either the planning or SAB process.
- 6.4 The HRA Business Plan is a 30-year document therefore assumptions must be made before viability can be confirmed. Some are given by Welsh Government such as the standard inflation factor, and rent increases, which to some degree are set within the rent policy. Key assumptions also include rent arrears and void levels, interest rates and pay awards. Any deviation from these assumptions can conflict with the overall position of the Business Plan and so constant monitoring is necessary to ensure it stays on track. The impact of Covid-19 is currently unknown but will also need to be a key consideration in the updated Business Plan.

7. LINKS TO RELEVANT COUNCIL POLICIES

- 7.1 The delivery of new homes for social rent links directly with the Council's ambition to deliver 400 new homes by 2025 (as indicated in the Building Together report which was approved by Cabinet on 15 January 2020) and Well Being Objectives 2 and 3.

7.2 **Corporate Plan 2018-2023.**

The delivery of new homes for social rent is coterminous with Well Being Objective 3 which seeks to address the availability, condition and sustainability of homes throughout the county borough. The commitment within this proposal to support the foundational and circular economies via the investment in new homes directly support the delivery of outcomes 3 and 4 within Well Being Objective 3.

7.3 It also directly contributes towards Well Being Objective 2 which aims to enable employment. The construction and manufacture of new homes within the borough will provide direct opportunities for skill development, training, apprenticeships and employment.

7.4 Willmott Dixon are bound via the SCAPE Framework to deliver a suite of community benefits which will include targeted recruitment and training opportunities for local people. Officers will ensure that the opportunities created via this investment are available via the Welsh Government's Legacy and Communities4Work programme (delivered by the Community Regeneration Team) thereby ensuring that those residents furthest from the labour market are able to take advantage of the opportunities created.

7.5 This proposal also contributes towards the aims of Well Being Objective 5 and 6 which aim to support residents' healthy lifestyle and support citizens to remain independent and improve their well-being. The innovative and climate resilient steel framed product that is sourced locally and delivers a Passivhaus, non-combustible envelope solution will provide the healthiest internal environment possible thereby helping to address the health and wellbeing of tenants, particularly those with limiting long term conditions.

7.6 **Caerphilly County Borough Local Development Plan up to 2021: Key Objective 9** – "Ensure an adequate and appropriate range of housing sites are available across the County Borough in the most suitable locations to meet the housing requirements of all sections of the population."

7.7 **Caerphilly Homes Service Plan (2018-2023), Priority Objective 2:** "Increase the provision of new, affordable homes to meet identified needs, promoting 'Lifetime Homes' principles for grant funded delivery, and, where appropriate, supporting Welsh Government's Innovative Housing Programme (IHP)".

7.8 **Welsh Government Strategies:** Reimagining Social House Building in Wales, February 2020. Independent Review of Affordable Housing, July 2019. National Development Framework, August 2019.

8. **WELL-BEING OF FUTURE GENERATIONS**

8.1 The development of the Trecenydd and Trethomas sites as a result of the innovative and exciting research and development undertaken by Willmott Dixon and Caledan Ltd will help to create a more prosperous Wales through the use of a local supply chain and the resulting opportunity to create new employment and training opportunities. This in turn will help build the resilience of individuals and communities. If individuals are able to improve their skill set and obtain well paid employment close to home, this in turn improves their resilience and together with the resilience of their families and communities.

- 8.2 The homes developed as a result of the work undertaken by Caledan Ltd and Willmott Dixon will be of the greatest quality and thermal efficiency. The new homes will be precision manufactured in a factory setting, provide high levels of energy efficiency which in turn will mean that the air quality within the new homes will be superior and directly contribute to the health and well being of occupants particularly those with respiratory complications. In addition, the new homes will be flexible to accommodate changing needs and the group floor apartments, accessible thereby aligning with the objectives of the 'healthier Wales' Well Being Goals.
- 8.3 The product that has been developed by Willmott Dixon and Caledan Ltd will be produced in Caerphilly and used in Caerphilly to build climate resilient homes. The homes will be of the highest quality and energy efficiency and will be made available to those on the housing waiting list thereby contributing towards the objective of creating a more equal Wales. It is anticipated that the cost to heat the new homes will not exceed £100 per annum thereby addressing fuel poverty.
- 8.4 The new homes will be built within existing communities in a sensitive and inclusive way. They will deliver new opportunities for employment and apprenticeships together with wider community benefits that will be integrated within the build contract and deliver legacy projects that help to develop vibrant, resilient and cohesive communities. All communication with regard to the new developments will be bilingual in order to support the creation of a vibrant culture and thriving Welsh Language.
- 8.5 The housing solution developed by Willmott Dixon and Calendan Ltd on behalf of Caerphilly Homes is an innovative and climate resilient steel framed product that is sourced locally and delivers a Passivhaus, non-combustible envelope solution ensuring that any new social rented homes achieve optimum energy efficiency, create a healthy internal environment, develop beautiful places and deliver lower running costs for tenants.
- 8.6 Adopting manufacturing principles Willmott Dixon have developed a "kit-of-parts" that can be adapted to site conditions and daylight orientation. It's designed with the circular economy in mind – make, use, re-use, hence the choice of steel. Each panel will be asset tagged and will be capable of being disassembled and reassembled into a different configuration at some future point.
- 8.7 The use of a MVHR (Mechanical Ventilation with Heat Recovery) system provides a low moisture stable, clean and fresh air environment supporting health and wellbeing
- 8.8 The steel frame, developed locally with Caledan Ltd, who are based on Penallta Industrial Estate, is thought to be the first steel framed kit, Passivhaus certified product of its type and directly contributes towards the creation of a globally responsible Wales.
- 8.9 The entire development proposal is coterminous with the five ways of working as defined within the sustainable development principle in the Act. The five ways of working of the sustainable development principle, listed in the Act are:
- Long Term – The importance of balancing short-term needs with the need to safeguard the ability of future generations to meet their long-term needs
 - Prevention - How acting to prevent problems occurring, or getting worse, may help public bodies meet their objectives

- Integration – Considering how the public body’s well-being objectives may impact upon each of the well-being goals, on their other objectives, or on the objectives of other public bodies
- Collaboration – Acting in collaboration with any other person (or different parts of the body itself) that could help the body to meet its well-being objectives
- Involvement – The importance of involving people with an interest in achieving the well-being goals and ensuring that those people reflect the diversity of the area which the body serves.

8.10 The proposal to undertake the pre-construction and development of The Crescent, Treceenydd and Llanfabon Drive, Trethomas together with the pre-construction of the former Oakdale School site has been developed in accordance with the five ways of working and the principles are embedded in every aspect of the proposal.

9. EQUALITIES IMPLICATIONS

9.1 A full Equality Impact Assessment will be completed prior to the submission of the report to Cabinet.

10. FINANCIAL IMPLICATIONS

10.1 The HRA is a self sufficient account that is funded primarily from rent received from tenants, which allows us to maintain our stock and manage tenancies effectively. For spend of a capital nature we are able to use contributions from the HRA together with assistance from Welsh Government in the form of grants or loans. Any expenditure over and above these funding mechanisms are then met from borrowing in accordance with the Councils Annual Strategy for Treasury Management, Capital Finance Prudential Indicators and the Minimum Revenue Provision Policy for 2020/2021.

10.2 The latest Business Plan submitted to Welsh Government in March 2020 included high level New Build proposals for some 411 properties over 5 years, estimated at £53.8m. This included proposals for the Treceenydd & Trethomas sites and also the former Oakdale Comprehensive school site.

10.3 The Plan, however, did assume that the completion of the WHQS Programme would be delivered by June 2020. Unfortunately, due to circumstances beyond our control from the Covid-19 pandemic, this was not achieved, although evidence confirms we were on track to complete by this date. At the time of writing this report, we are yet to re-commence entering tenants’ properties to complete the remaining work although this is anticipated to be Mid-August. Welsh Government officials are also in discussions with officers to agree an extension to the programme, likely to be December 2021.

10.4 This obviously deviates from the original plan, and early indications suggest the completion of the WHQS programme is likely to be some £7m higher due to the restrictions surrounding Covid-19, which will impact on the funding available for other projects such as new build initiatives.

10.5 The Business Plan assumed total borrowing for WHQS to be £45m, of which £23m had already been taken up, with a further £22m to achieve WHQS by June 2020. An additional £30m borrowing was also estimated for the new build proposals mentioned

above, therefore a remaining borrowing requirement of £52m for the HRA (as quoted in the Treasury Management Annual Strategy report to Special Council on 20th February 2020) with a borrowing take up of £75m in total between the 2 schemes.

- 10.6 Council recently approved a borrowing limit of £75m for the HRA to include the completion of the WHQS and the development programme going forward
- 10.7 A desktop exercise to revise the Business Plan to account for £7m increase and also a further assumption from the impact of Covid-19, that the level of rent arrears will rise by 2%, estimates that the borrowing requirement will need to increase by some £11.5m. This remains affordable within the HRA Business Plan but would require an increase to the original borrowing limit or a reduction in our future development plans. However, what is important to note is the original plan did not include any external funding in the form of IHP's or capital receipts from market sales for example, which will reduce the borrowing level required. It is also worth noting, that the indicative costs for the development proposals explained in this report are currently affordable as it only accounts for approximately 8% of the total new build proposals accounted for in the Business Plan over the next 5 years. If the remaining proposals turn into fruition, then the Business Plan will be reviewed to firm up the costs and include any prospective external funding, and then re-run to ensure the plan remains affordable. Further reviews are also necessary to account for the impact of Covid-19. If at that time, the borrowing limit is thought to be reached, a further report to Council may be necessary.

11. PERSONNEL IMPLICATIONS

- 11.1 There are no specific personnel implications resulting from this report.

12. CONSULTATIONS

- 12.1 Consultations will be undertaken prior to the submission of the report to Cabinet.

13. STATUTORY POWER

- 13.1 Local Government Act 1972 and the Housing Wales Act 2014

14. URGENCY (CABINET ITEMS ONLY)

- 14.1 This report is urgent and therefore not susceptible to the call-in procedure. A decision needs to be implemented urgently due to the fact that the Welsh Government only launched the Innovative Housing Programme funding opportunity on Friday 30th July with a deadline for a design review mid-September and the submission of a comprehensive application by the 25th September 2020. It is a requirement of Welsh Government funding that a Cabinet decision is in place to support an application for funding.

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Background Papers:**Appendices:**

- Appendix 1 SCAPE Process
- Appendix 2 Willmott Dixon Feasibility Study
- Appendix 3 Willmott Dixon Addendum

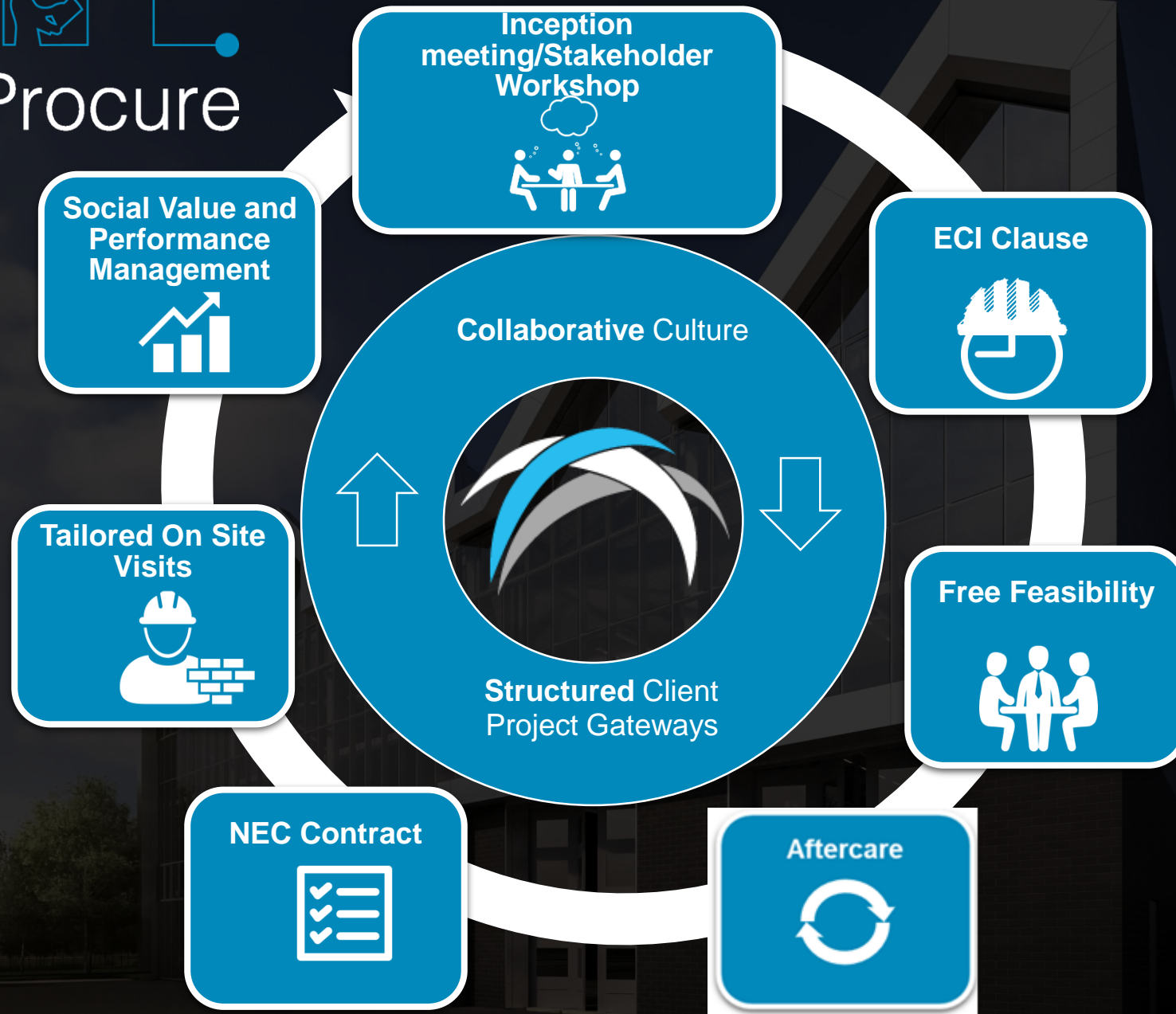
Scape Procure

Ensure that all client contacts understand ECI, Free feasibility, NEC, site visits and social value.

Aftercare – Ensuring Clients with ongoing projects from expired frameworks receive ongoing support and advice

Final conversations should be Social Value

Use all the elements to take clients on a journey

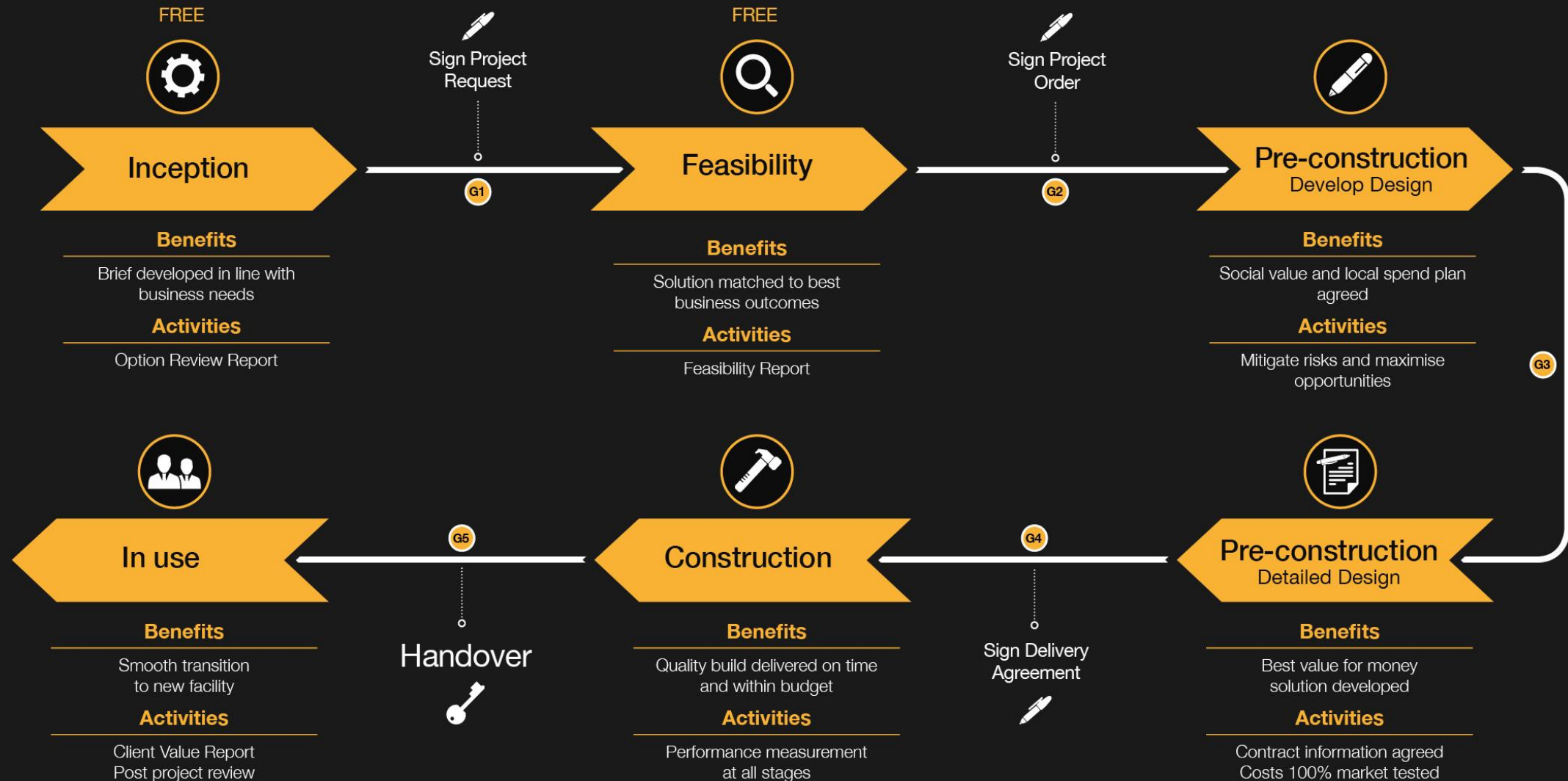


Efficiency Experience Performance Compliance

For clarity an inception meeting is a meeting between Scape and client and possibly DP if client is in a hurry. This is the initial meeting. Conversations at the initial meeting cover ECI Clause, free feasibility and NEC contract.

The stakeholder workshop is the launch meeting for a specific project or may be a monthly/quarterly review. All the key people should be at the stakeholder workshop.

A tried and tested project delivery process



Appendix 2



WILLMOTT DIXON

SINCE 1852

Caerphilly Innovation Housing

JUNE 2020





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Executive Summary

Proud to support the ambitious housing strategy of Caerphilly County Borough Council

Opening the door to innovatively designed, globally responsible homes

We are delighted to submit our Feasibility Report for a new and innovative way to deliver “fit for climate” housing across three sites in Caerphilly.

Caerphilly’s leadership in meeting the climate challenge is exemplified by the commissioning of this study, and in doing so, it has set an ambition to think longer term and strategically.

Set out within this report is the solution to construct homes for the future that are low energy, low impact and low life-cycle cost. These homes will be partially constructed in local factories in Wales, using a pre-designed “kit-of-parts”, driving quality, speed, lower maintenance and in time, reduced costs.

These homes will meet some of the most stringent quality standards in the world and champion life cycle value as opposed to lowest cost. They are significantly lower in cost to run. When compared to standard housing stock they produce less CO2 per annum; translating into reduced energy bills of up to 90% less than conventional homes.



90% LOWER ENERGY BILLS

MADE IN WALES



I am delighted with the Willmott Dixon relationship, how it has progressed and with the homes we have built.

Charlotte Johnson,
Programme Manager, Doncaster Council



Housing expertise

Willmott Dixon been a specialist residential builder since 1974, we build nearly 2,000 homes each year for all types of tenure: affordable, care residential, retirement villages, housing for sale and private rent, plus student accommodation.

Our homes come in all shapes, sizes and scale, from stand-alone 90 unit care homes to multi-phase estate regeneration to create a new ‘destination’ for communities.

Our people, and the homes they create, are proud of the positive impact our work has for communities. While our range of housing, skill-sets and client base is extensive, the main thing for hundreds of thousands of people across the country, is that what we produce is simply their home.

To ensure we can provide the best service to our customers, our residential teams work with our local construction office in a ‘one company’ approach so our customers benefit from a consistent team with full access to our range of skills, expertise and know-how for delivering your housing projects including more complex, high-density schemes.



1

Feasibility Description

1 Feasibility Description

The product

Caerphilly CBC have worked in collaboration with Willmott Dixon and our local supply chain to develop an innovative, Passivhaus certified, low energy housing product. The product has been designed to be fabricated as a kit of parts, constructed quickly on site and delivered by a Welsh supply chain of SMEs

From a strategic level the product boldly aims to tackle the shortage in social housing, drives towards a net zero carbon housing stock and an increased investment in Welsh construction SMEs.

From a residents perspective the product is designed to tackle the issues surrounding fuel poverty, community cohesion and healthy internal environments: optimising environmental factors of air quality, daylighting and temperature.

The product complies with all current and anticipated future housing legislation and aims to be groundbreaking in both it's life cycle cost and speed to provide.

We fully understand the implications of the Wellbeing of Future Generations Act and the requirements to demonstrate adherence to the 7 Goals of the Act. The design of this housing product, and in the way it will be delivered at site, will provide the required evidence to support Welsh Government's requirements.



Scope of this report

The purpose of this SCAPE report is to determine for Caerphilly CBC the viability for low energy and Passivhaus homes at the Oakdale site. We propose to trial the product at two pilot sites at Trethomas and Trecenydd in order to proceed to the next stage of procurement. The next 'preconstruction stage' would encompass further detailed design and pricing to establish a proposed contract sum. The preconstruction stage process for Oakdale will be led by the Development Solutions process described below.

This report details outline feasibility costs and programmes of delivery of the product for three selected sites:

Site 1 - Trethomas	12	product units (pilot site)
Site 2 - Trecenydd	8	product units (pilot site)
Site 3 - Oakdale	100	product units (Development Solutions)

Included in the report are cost plans for each site and also the proposed layout drawings for sites 1 and 2. The Oakdale site design has not been developed to this maturity as a comprehensive tenure mix analysis is required through a Development Appraisal. We have included a high level tenure mix for the Oakdale site within the Scope of Works section for consideration.

Oakdale site: Tenure and housing mix

		Numbers Based on 100 Homes	
Total Plots		100	%
Sales	1B Flat	0	0%
	2B Flat	0	0%
	2B House	13	13%
	3B House	17	17%
	4B House	30	30%
Social	1B Flat	10	10%
	2B Flat	10	10%
	2B House	8	8%
	3B House	6	6%
	4B House	6	6%
Totals		100	100.0%

The appraisal considers the tenure mix based on overall site area, market rates, and predicted demand. This appraisal will be subject to further consideration by Caerphilly CBC and approval before design work continues at this site.

1 Feasibility Description

The process for the pilot sites

We have been able to design and produce detailed feasibility budgets for the pilot projects as these sites are small and straightforward.

During the next stage we will complete the design in full collaboration with Caerphilly CBC Officers, and finalise the cost in an open book environment.

The process for the Oakdale site

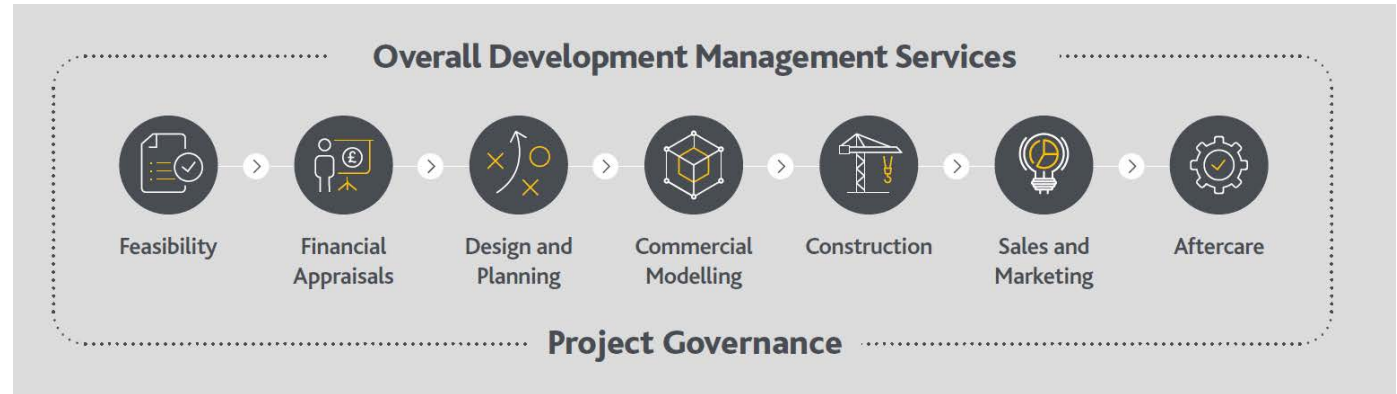
As the Oakdale site is proposed to have private for sale units as well as retained rental properties we are proposing adopting our Development Management model. This adopts the principles and benefits of joint ventures, but avoids the costs and complexity that can be associated with such vehicles.

We have recently completed Ashton Rise for Bristol City Council with this approach, successfully aligning the councils development aspirations with the delivery of social housing.

A Case Study on Ashton Rise is included as Appendix 1.



How does our proposal for Oakdale work?



During the next stage we will provide the development resources and expertise to deliver the project including:

- Market appraisal and viability analysis to establish
- Financial modelling
- Sales & marketing strategy
- Scheme concept designs
- House type design / specifications, ensuring products most suited for market sale
- Achieving planning permission (under a pre-construction contract)
- Management of plot sales
- Customer care for completed units

- We utilise our branding, covenant, reputation and development expertise to out-perform the local market in terms of both sales rates and values.
- We will provide a fixed price construction cost taking construction risk for the housing products.
- The Council provides development funding in order to minimise the cost of finance.
- The Council reimburses construction costs under a formal build contract.
- An incentive structure could be proposed to ensure WD is incentivised to increase sales values



2

Framework Achievements

2 Framework Achievements



Scape National Framework

We will approach this project in the Scape spirit of mutual trust and understanding. All work is rooted in a unique combination of partnering style, a long-term approach, a commitment to sustainable development and an ethos of continual learning.

As a Scape National Construction Framework Partner, we demonstrate value for money through our service offering, contractual performance management and commitment to employment and skills which is audited monthly and nationally benchmarked.

The extended project risks are mitigated through our early engagement and project certainty is increased through the use of the NEW suite of contract documents.

WILLMOTT DIXON HAS NEVER EXCEEDED ESTIMATED COSTS GIVEN AT THE PLANNING STAGE.

We do not recover internal costs for the feasibility stages. Open book market testing is with a quote-led approach from the local supply chain. OH&P and preliminary rates have been nationally tendered and 100% of the overall project costs can be independently verified by a third party cost consultant.

Because this scheme is breaking innovative new ground with both a kit-of-parts and Passivhaus we will also present full life cycle analysis during the Pre-Construction stage to demonstrate full VFM.



Over £1m a year in time and materials is invested in local community projects

We invest in your community; nationally managed and locally delivered. We have local spend and employment skills commitments on every project to ensure 85% of our project spend is with Small to Medium Enterprises.



100% of projects have been delivered within the funding envelope

We can react efficiently to project specific needs. Our ability ensures that costs are effectively managed.



99% of projects have been delivered since 2006

Through our early interrogation of project programme risk, and close measure of on site project performance we are able to provide confidence in delivery.



85% of our projects are from repeat customers and our average national customer satisfaction score is 90%

Customer satisfaction is paramount. The framework is a long term solution and places fewer demands on Customer resources.



An average of 97% of construction waste generated is diverted from landfill

Utilising our 10 point plan for sustainability agreed KPIs are implemented from preconstruction through to project completion. It enables us to measure our sustainability progress and to ensure continual improvement.



Three strikes and Willmott Dixon and removed from the Framework

Performance is guaranteed. The framework is continually controlled with Key Performance Indicators with every project benchmarked and audited by Scape.



3

Cost Planning

3 Cost Planning

We have included over leaf full BCIS Elemental Cost Plan breakdowns for the Trethomas and Trecenydd developments . We have also included an alternate per plot analysis for ease of reference.

For Oakdale we have given indicative Development Cost based on our recent Ashton Rise project, and the data from the Trethomas / Trecenydd pilot schemes. The Oakdale total project will be derived through the Development Solutions process as previously described.

The next PCSA Stage will agree the construction contract sum for all three sites based on detailed design and all site specific constraints.

We will provide predictability and cost certainty throughout the PCSA period by early alignment of the design and budget, together with the resolution of project logistics and risks. By embedding the Cost Plan at the heart of our preconstruction process and early engagement with our supply chain specialists we will add commercial and programme efficiencies to this project without compromising the vision or quality of the three sites

In producing our estimate, we have used rates from a selection of current and completed contracts, as well as seeking advice from our key selected supply chain partners for specialist works packages.

Using our collaborative cost management techniques and applying our extensive technical expertise, we can provide assurance that we have the skills to successfully deliver this project.

Project Cost Analysis

The total estimated construction cost for the proposed pilot sites are as follows:

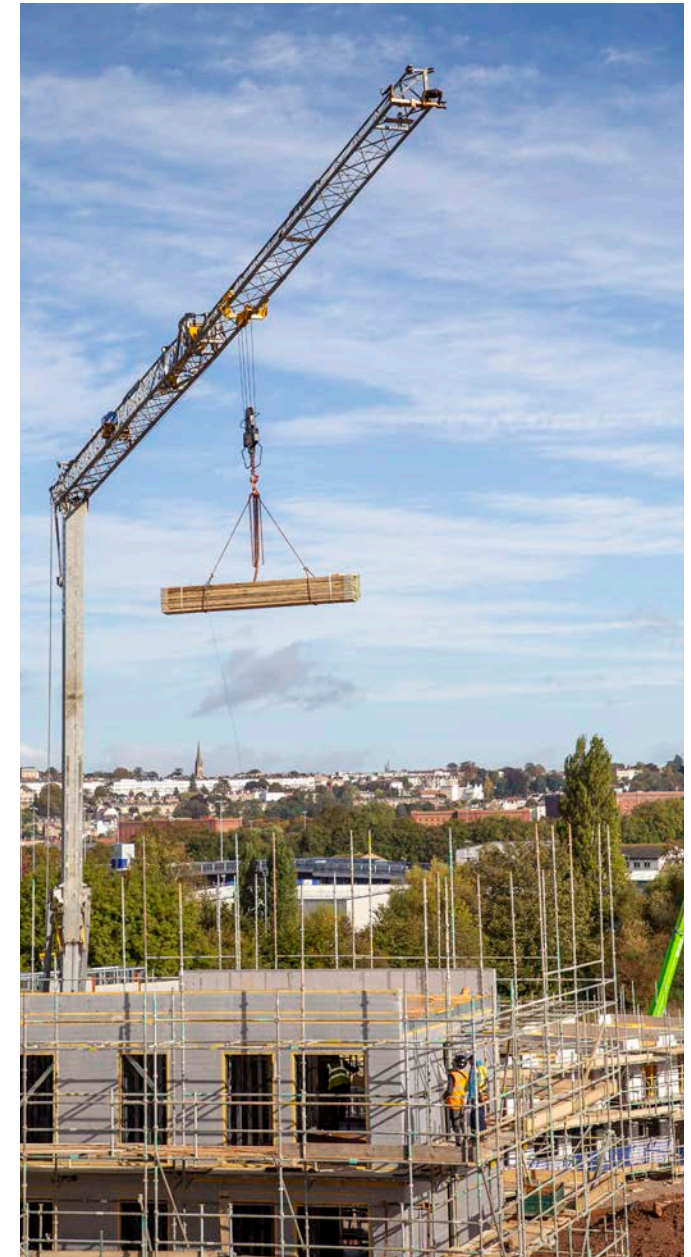
Site 1 - Trethomas £2,216,528.20

Site 2 - Trecenydd £1,545,145.57

All figures are excluding VAT; based on work commencing on site in February 2021.

We have benchmarked the costs for the pilot studies sites against Ashton Rise and the plot cost when adjusted for scale is comparable. In line with the drive for low energy homes we have innovatively engineered the product proposed for Trecenydd and Trethomas to be Passivhaus certified, and even with this enhanced specification, we have maintained the overall cost inline with Ashton Rise.

The cost plans provide an accurate reflection at this stage of the potential costs for these specific projects, and the known site constraints.



3 Cost Planning

Oakdale indicative plot cost

Plot Type / Ref	House Type	DQR	Nr	Total DQR	Total Cost	£/m2	Total Development
Site Wide Works (Say)					£1,500,000.00		£1,500,000.00
Sales Units							
2B House	Semi-Deatched	83	13	1079	£119,600.00	£1,440.96	£1,554,800.00
3B House	Semi-Deatched / Terrace	94	17	1598	£122,600.00	£1,304.26	£2,084,200.00
4B House	Detached / Semi Detached	110	30	3300	£127,000.00	£1,154.55	£3,810,000.00
Social Unit (Passivhaus)							£-
1B Flat	Terrace	50	10	500	£104,200.00	£2,084.00	£1,042,000.00
2B Flat	Terrace	58	10	580	£107,800.00	£1,858.62	£1,078,000.00
2B House	Semi-Deatched / Terrace	83	8	664	£119,600.00	£1,440.96	£956,800.00
3B House	Semi-Deatched / Terrace	94	6	564	£122,600.00	£1,304.26	£735,600.00
4B House	Semi-Deatched / Terrace	110	6	660	£127,000.00	£1,154.55	£762,000.00
Sub-Total			100	8945			£13,523,400.00
Main Contractor Prelims 12%							£1,622,808.00
Design Team & Other Fees 5%							£676,170.00
Main Contractors Risk & Inflation 5%							£676,170.00
Sub-Total							£16,498,548.00
Overhead & Profit 2.92%							£481,757.60
Total							£16,980,305.60
Cost Per Unit							£169,803.06

At this stage we would recommend an overall project budget for this site as £16,980,305.60

3 Cost Planning

Inclusions

The cost plan includes allowances for the following:

- Physical construction works;
- Main contractor's preliminaries;
- Main contractor's overheads and profit;
- Subcontractors' allowances for preliminaries, overheads and profit, design fees and risk;
- Project and design team fees associated surveys;
- An Assessment of Main Contractors Design development risk;
- An Assessment of Main Contractors Known Construction risk;

Costs are yet to be ascertained for specific risks. These will be assessed in conjunction with your team as the design develops

Exclusion

We have not included in our estimate allowances for:

- Other development and project costs including land acquisition & fees;
- Employer change risks;
- Employer other risks;
- Value added tax (VAT);
- Loose furniture and fittings
- Employer own fees / costs including Project Management/ Cost Consultant

We suggest suitable budgetary allowances are made for the above items as follows:

- Employers change and other risk
- Land acquisition & fees
- Legacy professional fees
- Loose furniture, white goods and equipment
- Employer own fees / costs including Project Management/ Cost Consultant
- Additional fees

Caerphilly Housing - Trethomas
 Feasibility (Stages 1- 3 only)
 15-Jun-20

Gross Internal Floor Area 657 m2
 Overall Site Area 3,258 m2
 Number of Storeys 3
 Date of Delivery Agreement 23 February 2021
 Contract Duration (weeks) 33

Project Stage
 Contract Form

Sector

Net Build Cost/m2

Contract
 NEC option A

Housing Residential

£ 2,974.67



		Preliminaries shown separately		Preliminaries & Fees apportioned				
Code	ELEMENT	Total Cost of element	Cost per m2 of GIFA	Total cost of element	Cost per m2 of GIFA	Percentage of net cost	Percentage of gross cost	Specification
1	SUBSTRUCTURE	74,484.95	£ 113.45	95,322	£ 145.19	5%	4%	
	1.1.1 Standard Foundations	74,484.95						
	1.1.2 Specialist Foundations	-						
	1.1.3 Lowest Floor Construction	-						
	1.1.4 Basement Excavation	-						
	1.1.5 Basement Retaining Walls	-						
2	SUPERSTRUCTURE	762,204.55	£ 1,160.98	975,429	£ 1,485.76	50%	44%	
	2.1 Frame	210,959.72						
	2.2 Upper Floors	62,926.94						
	2.3 Roof	105,630.90						
	2.4 Stairs and Ramps	16,429.29						
	2.5 External Walls	242,437.01						
	2.6 Windows and External Doors	82,083.44						
	2.7 Internal Walls and Partitions	5,008.47						
	2.8 Internal Doors	36,728.78						
3	INTERNAL FINISHES	60,755.53	£ 92.54	77,752	£ 118.43	4%	4%	
	3.1 Wall Finishes	11,972.35						
	3.2 Floor Finishes	19,714.00						
	3.3 Ceiling Finishes	29,069.17						
4	FF&E	21,831.79	£ 33.25	27,939	£ 42.56	1%	1%	
	4.1.1 General FF&E	-						
	4.1.2 Domestic Kitchen Fittings & Equipment	21,831.79						
	4.1.3 Special FF&E	-						
	4.1.4 Signs / Notices	-						
	4.1.5 Works of Art	-						
	4.1.6 Non-Mechanical & Non-Electrical Equipment	-						
	4.1.7 Internal Planting	-						
	4.1.8 Bird & Vermin Control	-						
5	SERVICES	229,889.25	£ 350.16	294,200	£ 448.12	15%	13%	
	5.1 Sanitary installations	-						
	5.2 Services Equipment	-						
	5.3 Disposal Installations	-						
	5.4 Water Installations	-						
	5.5 Heat Source	143,845.09						
	5.6 Space Heating / Air Conditioning	-						
	5.7 Ventilation Systems	-						
	5.8 Electrical Installations	69,588.84						
	5.9 Fuel Installations	-						
	5.10 Lift and Conveyor Installations	-						
	5.11 Fire and Lightning Protection	-						
	5.12 Comms, Security and Control Systems	-						
	5.13 Special Installations	-						

Caerphilly Housing - Trethomas
Feasibility (Stages 1- 3 only)
15-Jun-20

Gross Internal Floor Area 657 m2
Overall Site Area 3,258 m2
Number of Storeys 3
Date of Delivery Agreement 23 February 2021
Contract Duration (weeks) 33

Project Stage
Contract Form

Sector

Net Build Cost/m2

Contract
NEC option A

Housing Residential

£ 2,974.67



Code	ELEMENT	Preliminaries shown separately		Preliminaries & Fees apportioned				Specification
		Total Cost of element	Cost per m2 of GIFA	Total cost of element	Cost per m2 of GIFA	Percentage of net cost	Percentage of gross cost	
5.14	BWICS	16,455.31						
5.15	Testing and Commissioning	-						
6	PREFABRICATED BUILDINGS & UNITS	-	£ -	-	£ -	0%	0%	
6.1.1	Complete buildings	-						
6.1.2	Building units	-						
6.1.3	Pods	-						
7	WORK TO EXISTING BUILDING	-	£ -	-	£ -	0%	0%	
7.1	Minor Demolition & Alteration Work	-						
7.2	Repairs to existing services	-						
7.3	Damp proof course/fungus and beetle eradication	-						
8	EXTERNAL WORKS	376,863.31	£ 574.03	482,290	£ 734.62	25%	22%	
8.1	Site Preparation	52,301.43						
8.2	Roads, Paths and Pavings	125,172.43						
8.3	Soft landscaping, planting and irrigation systems	31,118.15						
8.4	Fencing, Railings and Walls	21,595.44						
8.5	External fixtures	24,614.28						
8.6	Drainage	84,662.37						
8.7	External Services	37,399.20						
8.8	Minor Building Works / Ancillary Buildings	-						
9	FACILITATING WORKS	-	£ -	-	£ -	0%	0%	
9.1	Toxic/hazardous/contaminated material treatment	-						
9.2	Major Demolition Works	-						
9.2.1	Demolition works	-						
9.2.2	Soft strip works	-						
9.3	Temporary support to adjacent structures	-						
9.4	Specialist Groundworks	-						
9.5	Temporary Diversion Works	-						
9.6	Extraordinary SI Works	-						
	SUB-TOTAL: BUILDING WORKS	1,526,029.37	2,324.42	1,952,931	£ 2,974.67	100%	88%	

Caerphilly Housing - Trethomas
 Feasibility (Stages 1- 3 only)
 15-Jun-20

Gross Internal Floor Area 657 m2
 Overall Site Area 3,258 m2
 Number of Storeys 3
 Date of Delivery Agreement 23 February 2021
 Contract Duration (weeks) 33

Project Stage
 Contract Form

Sector

Net Build Cost/m2

Contract
 NEC option A

Housing Residential

£ 2,974.67



Code	ELEMENT	Preliminaries shown separately		Preliminaries & Fees apportioned				
		Total Cost of element	Cost per m2 of GIFA	Total cost of element	Cost per m2 of GIFA	Percentage of net cost	Percentage of gross cost	Specification
10	MAIN CONTRACTOR'S PRELIMINARIES	369,450.06	£ 562.74					
10.1	Preliminaries (People Costs)	181,130.47						
10.2	Preliminaries (Regional Adjustment)	-						
10.3	Preliminaries (Equipment Costs)	27,554.02						
10.4	Preliminaries (Plant & Materials)	2,665.58						
10.5	Preliminaries (Subcontract Packages)	158,100.00						
11	FEES	172,035.80	£ 262.04	172,036	£ 262.04		8%	PRELIMS NOT APPORTIONED
11.1	Project/design/surveys fees	119,440.30						
11.2	Preconstruction Service Fee	18,130.00						Fee for both projects split equally
11.3	Design Management Fee	34,465.50						Fee for both projects split equally
11.4	Additional Preconstruction Services							
	SUB-TOTAL: INCL PRELIMS & FEES	2,067,515.23	3,149.20	2,124,967				
12	RISKS	91,561.76	£ 139.47	91,561.76	£ 139.47		4%	PRELIMS NOT APPORTIONED
12.1	Design Development	45,780.88						
12.2	Construction Risks	45,780.88						
12.3	Employer Change Risks	-						
12.4	Employer Other Risks	-						
13	FIXED PRICE	-	£ -	-	£ -		0%	PRELIMS NOT APPORTIONED
13.1	Tender inflation	Excluded						Do Not ADD
13.2	Construction inflation	Excluded						Do Not ADD
14	Contractors NCF Fee	57,451.34	£ 87.51					
14.1	WD Subcontractor Fee Percentage	55,337.84						
14.2	WD Direct Fee Percentage	2,113.50						
15	OTHER COSTS	-	£ -	-	£ -		0%	PRELIMS NOT APPORTIONED
	PROJECT TOTAL (EXCLUDING VAT)	2,216,528.33	3376.18	2,216,528			100%	

CLARIFICATIONS

1 No allowances have been included within the costing for specific ground or site risks, these will be developed in conjunction with the Employer once a detailed site investigation has been carried out for the sites, some risks and considerations might be:

- Toxic or hazardous material removal prior to demolition or refurbishment works
- Removal and/or treatment of contaminated ground material
- Eradication of Japanese knotweed or other invasive plant
- Taking down to ground level and removing complete buildings/structures or parts of buildings/structures, including services, fittings and finishes thereto (Demolition Works)
- Stripping out building components, services, fittings and finishes in from a building in preparatory works to demolition or refurbishment (Soft Strip)
- Site dewatering and pumping
- Breaking out and disposing of unidentified below ground obstructions
- Dealing with underground soft spots (assumed reasonable ground conditions)
- Soil stabilisation to improve bearing capacity or slip resistance of existing ground to facilitate construction
- Treatment of any excavated or topsoil material on site
- Ground gas venting measures
- Temporary diversion/removal of existing drainage system
- External services diversions
- Remedial works or repairs to existing services and drainage
- Delays or associated costs due to archaeological findings.
- Delays or associated costs due to ecological findings.

2 The following items have not been included within the costing of the site/dwellings, but maybe be considered and developed during the pre-construction services

- Provision of Kitchen appliances / White Goods
- Loose Fixtures Fittings & Equipment (Beds, Sofa's, Wardrobes and the Like)
- Photovoltaics (PV's)
- Rainwater Harvesting
- Incoming gas supply
- Outside taps
- Security lights to rear gardens
- Security alarms
- Any works associated with Section Agreements including Applications, Inspections etc.
- Works outside site boundary including works to public highways
- Client Direct costs (Legal Fees, Project Manager, Cost Consultant, Marketing, Funding)

It is recommended that the Employer makes suitable budgetary allowances for the above

Caerphilly Housing - Trethomas (Option 3) - Plot Breakdown Cost

Plot Nr	House Type	GIFA	Sub-Structures	£/m2	Above DPC	£/m2	Externals	£/m2	Total Cost	£/m2
Council Land	N/A	1465					252,544.25	£ 172.39	£ 252,544.25	£172.39
Plot 1	GF - End Terrace	52.96	£ 6,324.80	£ 119.43	94,026.91	1,775.43	9,717.84	£ 183.49	£ 110,069.54	£2,078.35
Plot 2	FF - End Terrace	56.46	£ 6,324.80	£ 112.02	95,774.22	1,696.32	10,458.26	£ 185.23	£ 112,557.28	£1,993.58
Plot 3	GF - Mid Terrace 1 of 1	52.96	£ 5,971.64	£ 112.76	77,995.49	1,472.72	10,292.77	£ 194.35	£ 94,259.90	£1,779.83
Plot 4	FF - Mid Terrace 1 of 1	56.46	£ 5,971.64	£ 105.77	79,742.81	1,412.38	9,613.32	£ 170.27	£ 95,327.76	£1,688.41
Plot 5	GF - End Terrace	52.96	£ 6,324.80	£ 119.43	94,026.91	1,775.43	9,886.89	£ 186.69	£ 110,238.60	£2,081.54
Plot 6	FF - End Terrace	56.46	£ 6,324.80	£ 112.02	95,774.22	1,696.32	9,983.32	£ 176.82	£ 112,082.34	£1,985.16
Plot 7	GF - End Terrace	52.96	£ 6,324.80	£ 119.43	94,026.91	1,775.43	11,794.15	£ 222.70	£ 112,145.85	£2,117.56
Plot 8	FF - End Terrace	56.46	£ 6,324.80	£ 112.02	95,774.22	1,696.32	12,300.20	£ 217.86	£ 114,399.22	£2,026.20
Plot 9	GF - Mid Terrace 1 of 1	52.96	£ 5,971.64	£ 112.76	77,995.49	1,472.72	11,101.95	£ 209.63	£ 95,069.08	£1,795.11
Plot 10	FF - Mid Terrace 1 of 1	56.46	£ 5,971.64	£ 105.77	79,742.81	1,412.38	9,614.55	£ 170.29	£ 95,328.99	£1,688.43
Plot 11	GF - End Terrace	52.96	£ 6,324.80	£ 119.43	94,026.91	1,775.43	9,843.19	£ 185.86	£ 110,194.90	£2,080.72
Plot 12	FF - End Terrace	56.46	£ 6,324.80	£ 112.02	95,774.22	1,696.32	9,712.64	£ 172.03	£ 111,811.66	£1,980.37
			£ 74,484.95		£ 1,074,681.12		£ 376,863.31		£ 1,526,029.37	

Sub-Structures	£/m2	Above DPC	£/m2	Externals	£/m2	Total Cost	£/m2	
Average Cost Per Unit	£ 6,207.08	£113.57	£ 89,556.76	£1,638.10	£ 10,359.92	£189.60	£ 106,123.76	£1,941.27

Caerphilly Housing - Trecenydd
Feasibility (Stages 1- 3 only)
15-Jun-20

Gross Internal Floor Area 438 m2
Overall Site Area 2,305 m2
Number of Storeys 3
Date of Delivery Agreement 23 February 2021
Contract Duration (weeks) 30

Project Stage
Contract Form

Sector

Net Build Cost/m2

Contract
NEC option A

Housing Residential

£ 3,026.98



Code	ELEMENT	Preliminaries shown separately		Preliminaries & Fees apportioned				Specification
		Total Cost of element	Cost per m2 of GIFA	Total cost of element	Cost per m2 of GIFA	Percentage of net cost	Percentage of gross cost	
1	SUBSTRUCTURE	49,185.75	£ 112.38	68,116	£ 155.63	5%	4%	
	1.1.1 Standard Foundations	49,185.75						
	1.1.2 Specialist Foundations	-						
	1.1.3 Lowest Floor Construction	-						
	1.1.4 Basement Excavation	-						
	1.1.5 Basement Retaining Walls	-						
2	SUPERSTRUCTURE	486,756.24	£ 1,112.13	674,100	£ 1,540.17	51%	44%	
	2.1 Frame	130,428.46						
	2.2 Upper Floors	41,951.29						
	2.3 Roof	69,557.73						
	2.4 Stairs and Ramps	10,952.86						
	2.5 External Walls	151,318.77						
	2.6 Windows and External Doors	54,722.29						
	2.7 Internal Walls and Partitions	3,338.98						
	2.8 Internal Doors	24,485.86						
3	INTERNAL FINISHES	40,503.68	£ 92.54	56,093	£ 128.16	4%	4%	
	3.1 Wall Finishes	7,981.57						
	3.2 Floor Finishes	13,142.67						
	3.3 Ceiling Finishes	19,379.45						
4	FF&E	14,554.53	£ 33.25	20,156	£ 46.05	2%	1%	
	4.1.1 General FF&E	-						
	4.1.2 Domestic Kitchen Fittings & Equipment	14,554.53						
	4.1.3 Special FF&E	-						
	4.1.4 Signs / Notices	-						
	4.1.5 Works of Art	-						
	4.1.6 Non-Mechanical & Non-Electrical Equipment	-						
	4.1.7 Internal Planting	-						
	4.1.8 Bird & Vermin Control	-						
5	SERVICES	158,529.59	£ 362.20	219,545	£ 501.61	17%	14%	
	5.1 Sanitary installations	-						
	5.2 Services Equipment	-						
	5.3 Disposal Installations	-						
	5.4 Water Installations	-						
	5.5 Heat Source	101,166.82						
	5.6 Space Heating / Air Conditioning	-						
	5.7 Ventilation Systems	-						
	5.8 Electrical Installations	46,392.56						
	5.9 Fuel Installations	-						
	5.10 Lift and Conveyor Installations	-						
	5.11 Fire and Lightning Protection	-						
	5.12 Comms, Security and Control Systems	-						
	5.13 Special Installations	-						

Caerphilly Housing - Trecenydd
Feasibility (Stages 1- 3 only)
15-Jun-20

Gross Internal Floor Area 438 m2
Overall Site Area 2,305 m2
Number of Storeys 3
Date of Delivery Agreement 23 February 2021
Contract Duration (weeks) 30

Project Stage
Contract Form

Sector

Net Build Cost/m2

Contract
NEC option A

Housing Residential

£ 3,026.98



Code	ELEMENT	Preliminaries shown separately		Preliminaries & Fees apportioned				Specification
		Total Cost of element	Cost per m2 of GIFA	Total cost of element	Cost per m2 of GIFA	Percentage of net cost	Percentage of gross cost	
5.14	BWICS	10,970.21						
5.15	Testing and Commissioning	-						
6	PREFABRICATED BUILDINGS & UNITS	-	£ -	-	£ -	0%	0%	
6.1.1	Complete buildings	-						
6.1.2	Building units	-						
6.1.3	Pods	-						
7	WORK TO EXISTING BUILDING	-	£ -	-	£ -	0%	0%	
7.1	Minor Demolition & Alteration Work	-						
7.2	Repairs to existing services	-						
7.3	Damp proof course/fungus and beetle eradication	-						
8	EXTERNAL WORKS	207,121.06	£ 473.22	286,838	£ 655.36	22%	19%	
8.1	Site Preparation	40,426.28						
8.2	Roads, Paths and Pavings	53,453.92						
8.3	Soft landscaping, planting and irrigation systems	31,914.02						
8.4	Fencing, Railings and Walls	9,685.18						
8.5	External fixtures	6,956.21						
8.6	Drainage	48,415.19						
8.7	External Services	16,270.27						
8.8	Minor Building Works / Ancillary Buildings	-						
9	FACILITATING WORKS	-	£ -	-	£ -	0%	0%	
9.1	Toxic/hazardous/contaminated material treatment	-						
9.2	Major Demolition Works	-						
9.2.1	Demolition works	-						
9.2.2	Soft strip works	-						
9.3	Temporary support to adjacent structures	-						
9.4	Specialist Groundworks	-						
9.5	Temporary Diversion Works	-						
9.6	Extraordinary SI Works	-						
	SUB-TOTAL: BUILDING WORKS	956,650.85	2,185.73	1,324,848	£ 3,026.98	100%	86%	

Caerphilly Housing - Trecenydd
Feasibility (Stages 1- 3 only)
15-Jun-20

Gross Internal Floor Area 438 m2
Overall Site Area 2,305 m2
Number of Storeys 3
Date of Delivery Agreement 23 February 2021
Contract Duration (weeks) 30

Project Stage
Contract Form

Sector

Net Build Cost/m2

Contract
NEC option A

Housing Residential

£ 3,026.98



Code	ELEMENT	Preliminaries shown separately		Preliminaries & Fees apportioned				
		Total Cost of element	Cost per m2 of GIFA	Total cost of element	Cost per m2 of GIFA	Percentage of net cost	Percentage of gross cost	Specification
10	MAIN CONTRACTOR'S PRELIMINARIES	329,477.24	£ 752.78					
10.1	Preliminaries (People Costs)	166,162.48						
10.2	Preliminaries (Regional Adjustment)	-						
10.3	Preliminaries (Equipment Costs)	25,791.50						
10.4	Preliminaries (Plant & Materials)	2,423.25						
10.5	Preliminaries (Subcontract Packages)	135,100.00						
11	FEES	162,898.34	£ 372.19	162,898	£ 372.19		11%	PRELIMS NOT APPORTIONED
11.1	Project/design/surveys fees	110,302.84						
11.2	Preconstruction Service Fee	18,130.00						Fee for both projects split equally
11.3	Design Management Fee	34,465.50						Fee for both projects split equally
11.4	Additional Preconstruction Services							
	SUB-TOTAL: INCL PRELIMS & FEES	1,449,026.43	3,310.70	1,487,746				
12	RISKS	57,399.05	£ 131.14	57,399.05	£ 131.14		4%	PRELIMS NOT APPORTIONED
12.1	Design Development	28,699.53						
12.2	Construction Risks	28,699.53						
12.3	Employer Change Risks	-						
12.4	Employer Other Risks	-						
13	FIXED PRICE	-	£ -	-	£ -		0%	PRELIMS NOT APPORTIONED
13.1	Tender inflation	Excluded						Do Not ADD
13.2	Construction inflation	Excluded						Do Not ADD
14	Contractors NCF Fee	38,719.79	£ 88.47					
14.1	WD Subcontractor Fee Percentage	36,776.02						
14.2	WD Direct Fee Percentage	1,943.77						
15	OTHER COSTS	-	£ -	-	£ -		0%	PRELIMS NOT APPORTIONED
	PROJECT TOTAL (EXCLUDING VAT)	1,545,145.27	3530.31	1,545,145			100%	

CLARIFICATIONS

1 No allowances have been included within the costing for specific ground or site risks, these will be developed in conjunction with the Employer once a detailed site investigation has been carried out for the sites, some risks and considerations might be:

- Toxic or hazardous material removal prior to demolition or refurbishment works
- Removal and/or treatment of contaminated ground material
- Eradication of Japanese knotweed or other invasive plant
- Taking down to ground level and removing complete buildings/structures or parts of buildings/structures, including services, fittings and finishes thereto (Demolition Works)
- Stripping out building components, services, fittings and finishes in from a building in preparatory works to demolition or refurbishment (Soft Strip)
- Site dewatering and pumping
- Breaking out and disposing of unidentified below ground obstructions
- Dealing with underground soft spots (assumed reasonable ground conditions)
- Soil stabilisation to improve bearing capacity or slip resistance of existing ground to facilitate construction
- Treatment of any excavated or topsoil material on site
- Ground gas venting measures
- Temporary diversion/removal of existing drainage system
- External services diversions
- Remedial works or repairs to existing services and drainage
- Delays or associated costs due to archaeological findings.
- Delays or associated costs due to ecological findings.

2 The following items have not been included within the costing of the site/dwellings, but maybe be considered and developed during the pre-construction services

- Provision of Kitchen appliances / White Goods
- Loose Fixtures Fittings & Equipment (Beds, Sofa's, Wardrobes and the Like)
- Photovoltaics (PV's)
- Rainwater Harvesting
- Incoming gas supply
- Outside taps
- Security lights to rear gardens
- Security alarms
- Any works associated with Section Agreements including Applications, Inspections etc.
- Works outside site boundary including works to public highways
- Client Direct costs (Legal Fees, Project Manager, Cost Consultant, Marketing, Funding)

It is recommended that the Employer makes suitable budgetary allowances for the above

Caerphilly Housing - Trecenydd - Plot Breakdown Cost

Plot Nr	House Type	GIFA	Sub-Structures	£/m2	Above DPC	£/m2	Externals	£/m2	Total Cost	£/m2
Council Land	N/A	1258					137,434.86	£ 109.25	£ 137,434.86	£109.25
Plot 1	GF - End Terrace	52.96	£ 6,324.80	£ 119.43	94,684.93	1,787.86	8,199.23	£ 154.82	£ 109,208.96	£2,062.10
Plot 2	FF - End Terrace	56.46	£ 6,324.80	£ 112.02	96,432.25	1,707.97	8,736.46	£ 154.74	£ 111,493.51	£1,974.73
Plot 3	GF - Mid Terrace 1 of 2	52.96	£ 5,971.64	£ 112.76	78,653.76	1,485.15	8,727.90	£ 164.80	£ 93,353.30	£1,762.71
Plot 4	FF - Mid Terrace 1 of 2	56.46	£ 5,971.64	£ 105.77	80,401.08	1,424.04	8,755.72	£ 155.08	£ 95,128.44	£1,684.88
Plot 5	GF - Mid Terrace 1 of 2	52.96	£ 5,971.64	£ 112.76	78,653.76	1,485.15	8,477.47	£ 160.07	£ 93,102.87	£1,757.98
Plot 6	FF - Mid Terrace 1 of 2	56.46	£ 5,971.64	£ 105.77	80,401.08	1,424.04	8,711.85	£ 154.30	£ 95,084.56	£1,684.10
Plot 7	GF - End Terrace	52.96	£ 6,324.80	£ 119.43	94,684.93	1,787.86	8,727.90	£ 164.80	£ 109,737.63	£2,072.09
Plot 8	FF - End Terrace	56.46	£ 6,324.80	£ 112.02	96,432.25	1,707.97	9,349.68	£ 165.60	£ 112,106.73	£1,985.60

£ 49,185.75

£ 700,344.04

£ 207,121.06

£ 956,650.85

Average Cost Per Unit

Sub-Structures	£/m2	Above DPC	£/m2	Externals	£/m2	Total Cost	£/m2
£ 6,148.22	£112.49	£ 87,543.01	£1,601.26	£ 8,710.78	£159.28	£ 102,402.00	£1,873.03



4

Outline
Programme
(key dates
schedule)

4 Outline Programme (key dates schedule)

We have included overleaf a combined preconstruction and construction programme for the works at Trethomas and Trecenydd.

The programme has been developed using historic data and rates from similar residential projects. To allow for the innovative nature of this project in relation to its Passivhaus specification we have included time on the programme for the required air tests and site quality checking regimes. We envisage following the construction of Site 1 and Site 2 lessons will be learnt that will allow Site 3 to potentially offer even greater time efficiency in the operational site delivery stage.



The table below shows the target milestone dates during the preconstruction and construction stage.

Milestone Activity	Date
Commence pre construction stage	29-6-2020
Pre Application Pack issued for consultation	3-8-2020
Submit Full Planning Applications - both sites	22-9-2020
Anticipated Planning Approval	15-12-2020
Issue final Contract sum to Caerphilly for approval	12-1-2021
Contracts agreed	23-2-2021
Start on site Trethomas	22-2-2021
Completion of Trethomas	15-10-2021
Start on site Trecenydd	22-3-2021
Completion of Trecenydd	21-10-2021

Our current estimation of the construction programmes are:

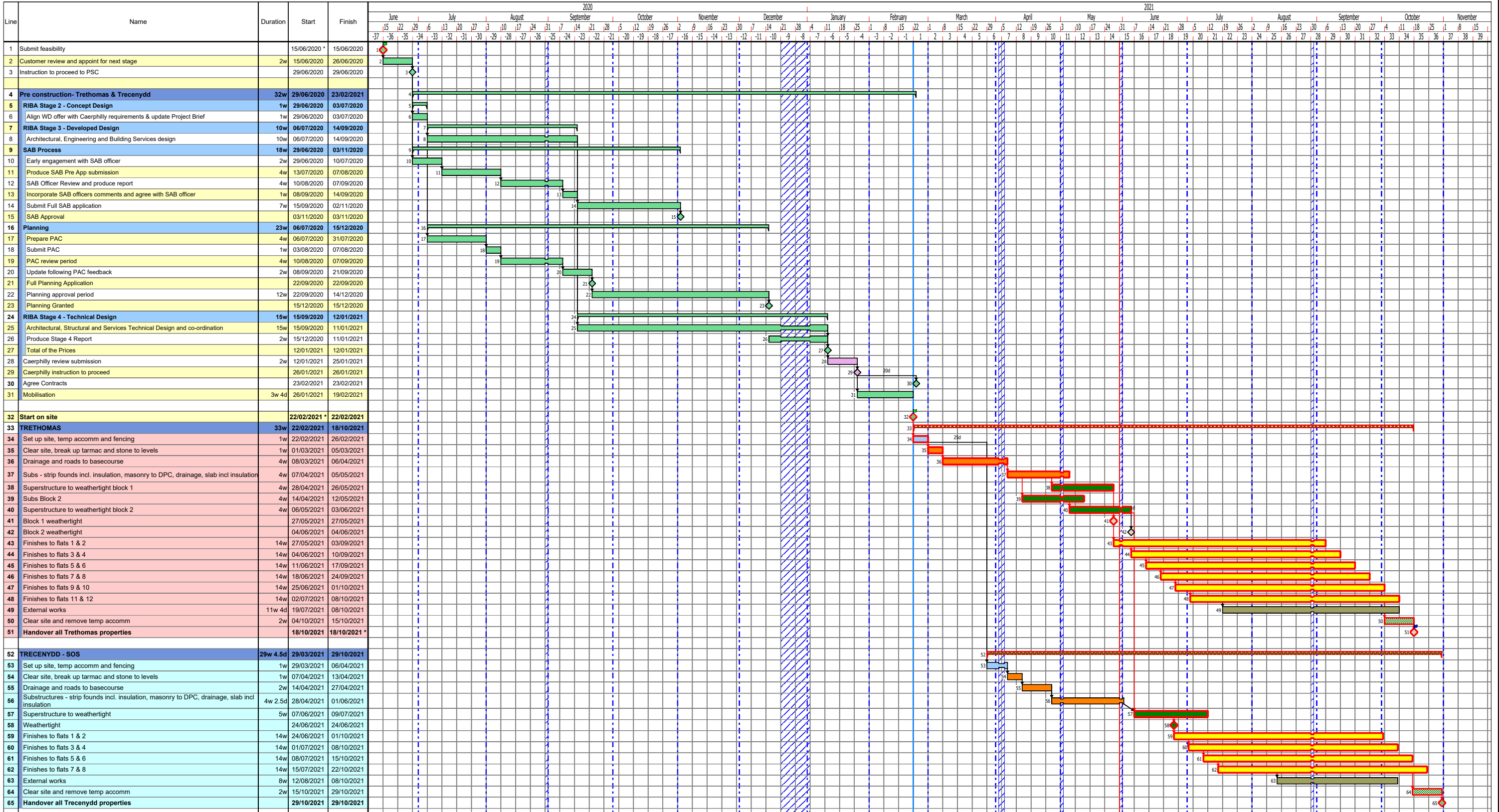
Site 1 Trethomas	34 weeks
Site 2 Trecenydd	31 weeks
Site 3 Oakdale	We would propose to issue a preconstruction and construction programme for Site 3 following Caerphilly CBC's review and agreement of the Outline Development Analysis.



5

Outline
Programme
Gantt Chart

Caerphilly Innovation Housing



Line	Name	Duration	Start	Finish
37			15	37
38			16	38
39			17	39
40			18	40
41			19	41
42			20	42
43			21	43
44			22	44
45			23	45
46			24	46
47			25	47
48			26	48
49			27	49
50			28	50
51			29	51
52			30	52
53			31	53
54			1	54
55			2	55
56			3	56
57			4	57
58			5	58
59			6	59
60			7	60
61			8	61
62			9	62
63			10	63
64			11	64
65			12	65
66			13	66
67			14	67
68			15	68
69			16	69
70			17	70
71			18	71
72			19	72
73			20	73
74			21	74
75			22	75
76			23	76
77			24	77
78			25	78
79			26	79
80			27	80
81			28	81
82			29	82
83			30	83
84			31	84
85			1	85
86			2	86
87			3	87
88			4	88
89			5	89
90			6	90
91			7	91
92			8	92
93			9	93
94			10	94
95			11	95
96			12	96
97			13	97
98			14	98
99			15	99
100			16	100

WD Codes
■ Pre-Con Stages ■ customers time line ■ Key Dates & Activities ■ Enabling Works ■ Substructure ■ Superstructure ■ Internal Works ■ External Works



6

Scope of the Works

6 Scope of the Works

Please see our Design Proposals for Sites 1 and 2.

Drawings

Site 1 and Site 2

Drawing 1 - SK-04-01A---1B2P-Site Plan Option C

Drawing 2 - SK-03-01---1B2P-Site Plan Option 3

Drawing 3 - SK-03-02---1B2P-Site Plan Option 4

Drawing 4 - 200220_A-100_House Type 1B2P

Drawing 5 - A-00-502-House Type 1B2P-Mirrored Arrangement – 3 Terrace

Drawing 6 - A-00-502-House Type 1B2P-Mirrored Arrangement – 4 Terrace

Drawing 7 - 200221_A-200_House Type 1B2P (1B2P) – Elevations

Drawing 8 - SK-00-01---Proposed Elevations 1B2P 3-block Terrace

Site 3

Outline Development Appraisal

Please see Appendix 2 for a copy of the Willmott Dixon Development Services introductory brochure detailing the process and showing previous project case studies.

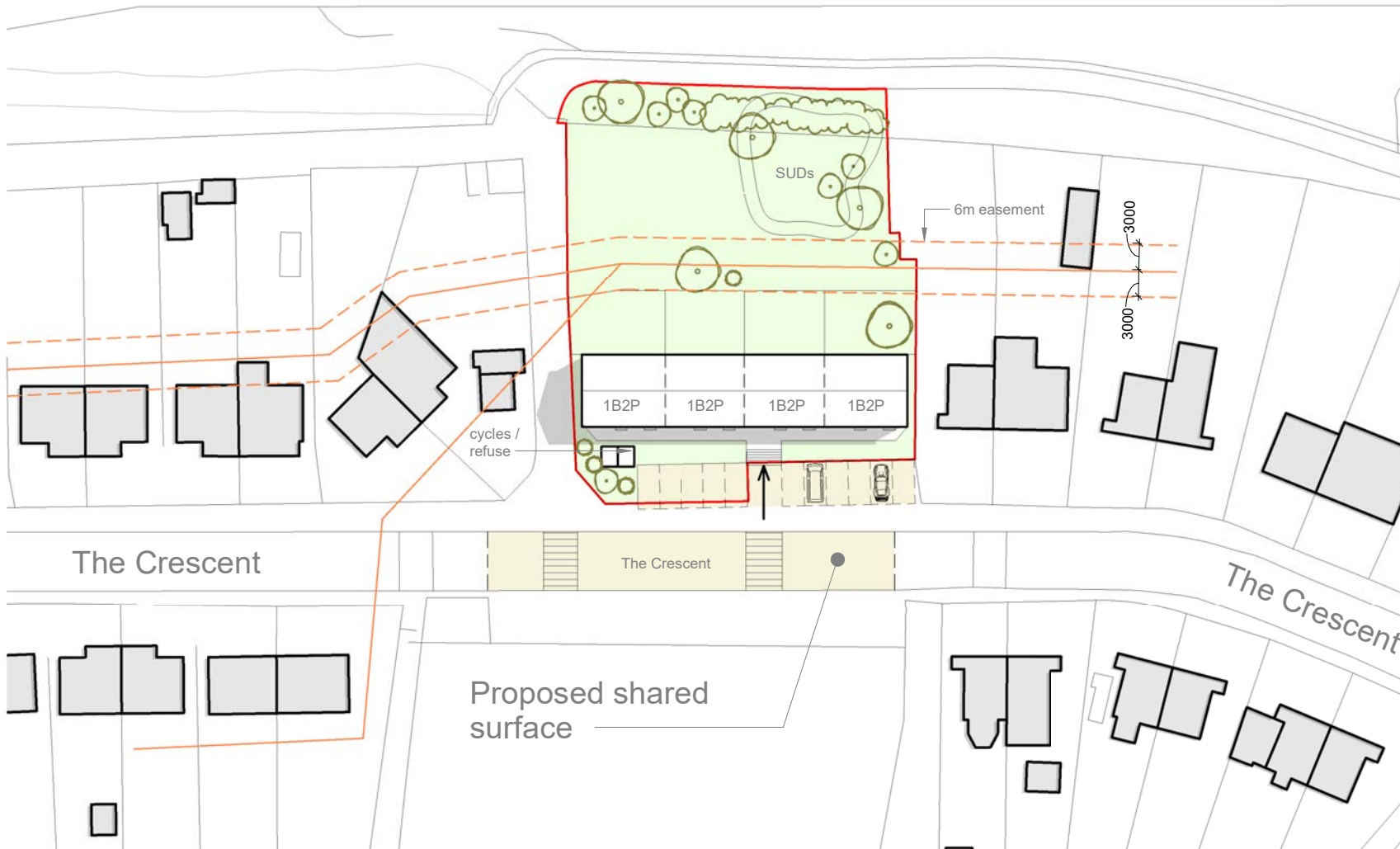


10no units TOTAL

Existing surface water drain and easement

A469

A469



Feasibility Study

15 June 2020
drawing no.1

A	08/06/20	JP	1B2P house removed from rear of site
-			CheckerFIRST ISSUE
Rev	Date	Check	Description

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Project
PH Concepts, Caerphilly
Trecenydd
Willmott Dixon

Title
1B2P Scheme - Site Plan - Option C

Status
Sketch

Scale at A3
1 : 500

Job No	Sheet No	Revision
4492	SK-04-01	A



12no units TOTAL

Feasibility Study
15 June 2020
drawing no.2

Rev	Date	Check	Description
-		Checker	FIRST ISSUE

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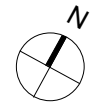
Project
PH Concepts, Caerphilly
Trethomas
Willmott Dixon

Title
1B2P Scheme - Site Plan - Option 3

Status
Sketch

Scale at A3
1 : 500

Job No	Sheet No	Revision
4492	SK-03-01	



12no units TOTAL

Feasibility Study
15 June 2020
drawing no.3

Rev	Date	Checker	DESCRIPTION
-		Holder	FIRST ISSUE

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Project
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Trethomas
Willmott Dixon

Title
1B2P Scheme - Site Plan - Option 4

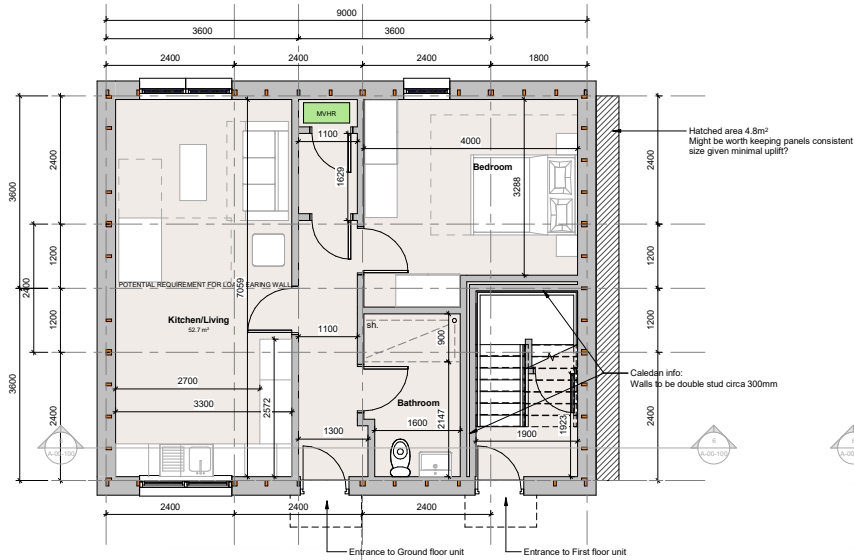
Status
Sketch

Scale at A3
1 : 500

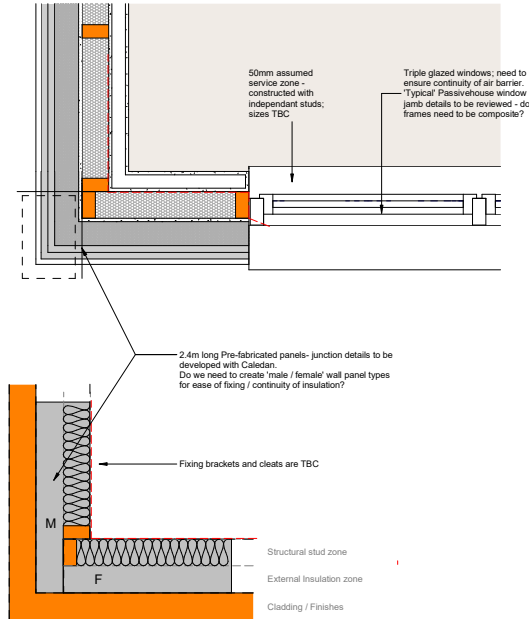
Job No	Sheet No	Revision
4492	SK-03-02	

HOUSE TYPE 01

GROUND FLOOR - 1B2P

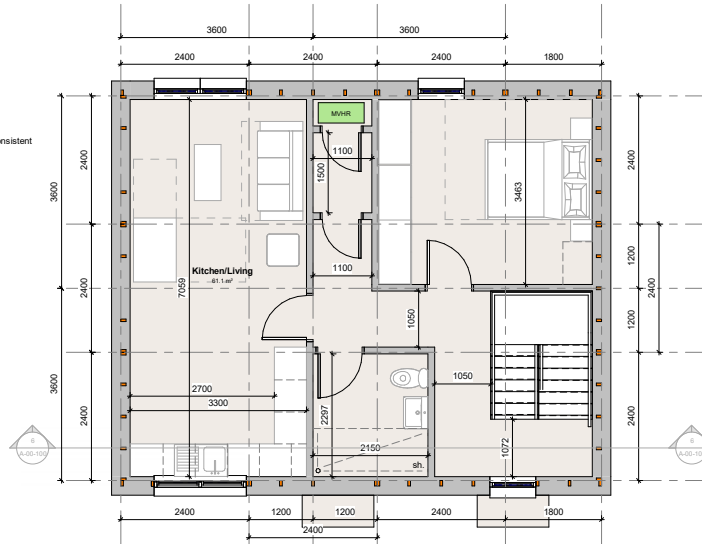


00 Ground Floor
1 : 50

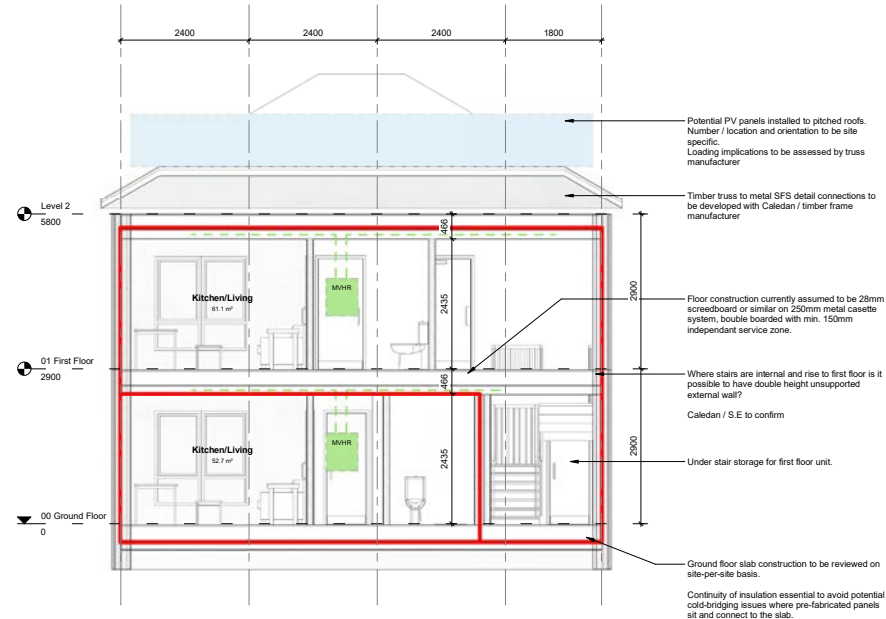


Typical Wall Panel Construction
1 : 10

FIRST FLOOR - 1B2P



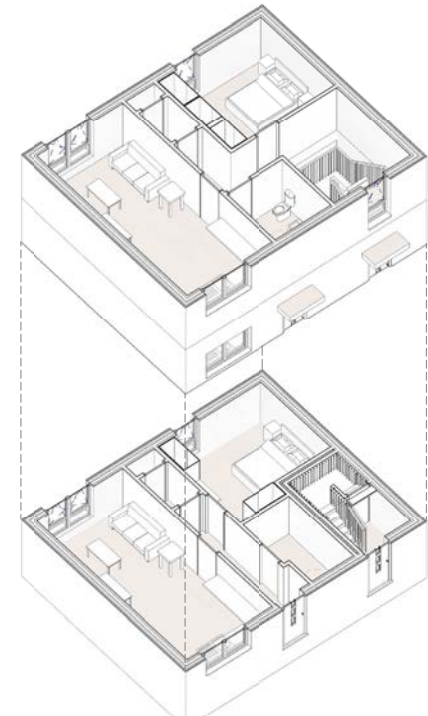
01 First Floor
1 : 50



Typical Section Schematic
1 : 50

Assumptions & Observations to be reviewed and verified with WD and supply chain.

- Where stairs have been brought into the building envelope some assumptions have been made with regards to panel sizes - inclusion of stairs will result in double height structural panels so need to ensure this is possible via Caledan and S.E.
- Party walls indicated on proposals currently indicate the same 100mm SFS stud walls. These will need to be fire protected to achieve min. 1hr protection and current assumption is that they would need to be fully filled to achieve a 0 U-Value. This is TBC by Caledan / SAP assessor.
- U-value calculations need to take into account all SFS members including bracing elements as these essentially reduce the insulation thickness to the outermost layer of 60mm phenolic insulation.
- The plans as shown propose that a clear 50mm service zone is provided to all external walls - the stud thickness / connection details are to be confirmed as there is potential for this zone to change dependant on structural requirements.
- Window jamb details will need to be reviewed in terms of any recess - need to ensure no cold bridging occurs and we achieve continuity of air and thermal barriers.
- Exact sizes of MVHR to be confirmed alongside access requirements - I.E. can access to filters be via access panels



FIRST ISSUE			
Rev	Date	Check	Description

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Project: Housing Concepts
Wilmott Dixon
Caerphilly

Title: House Type 1B2P

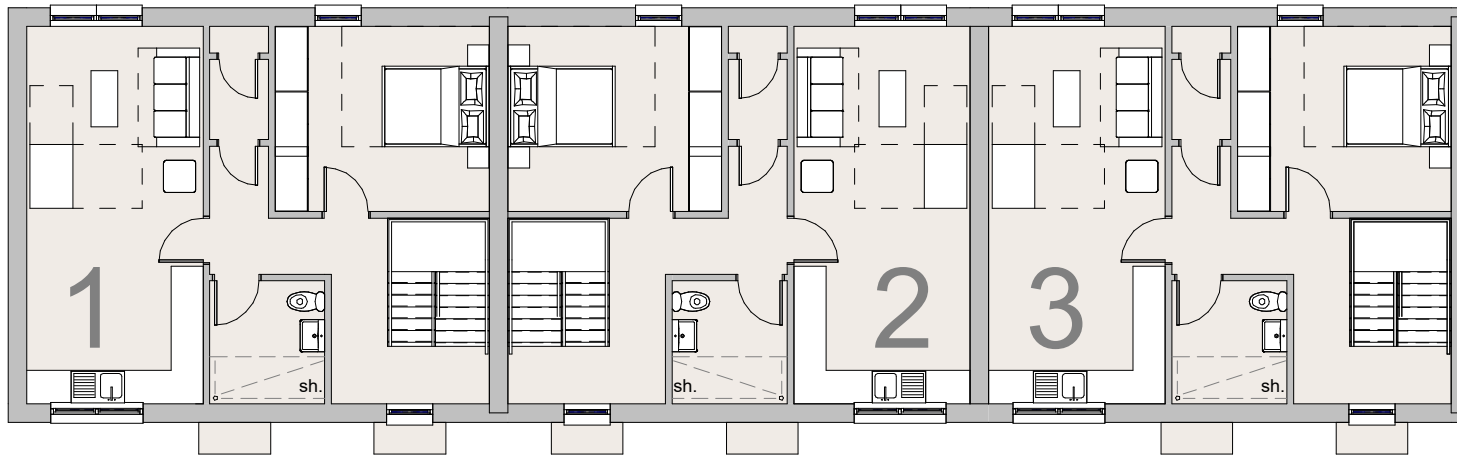
Scale: A1

Concept As indicated

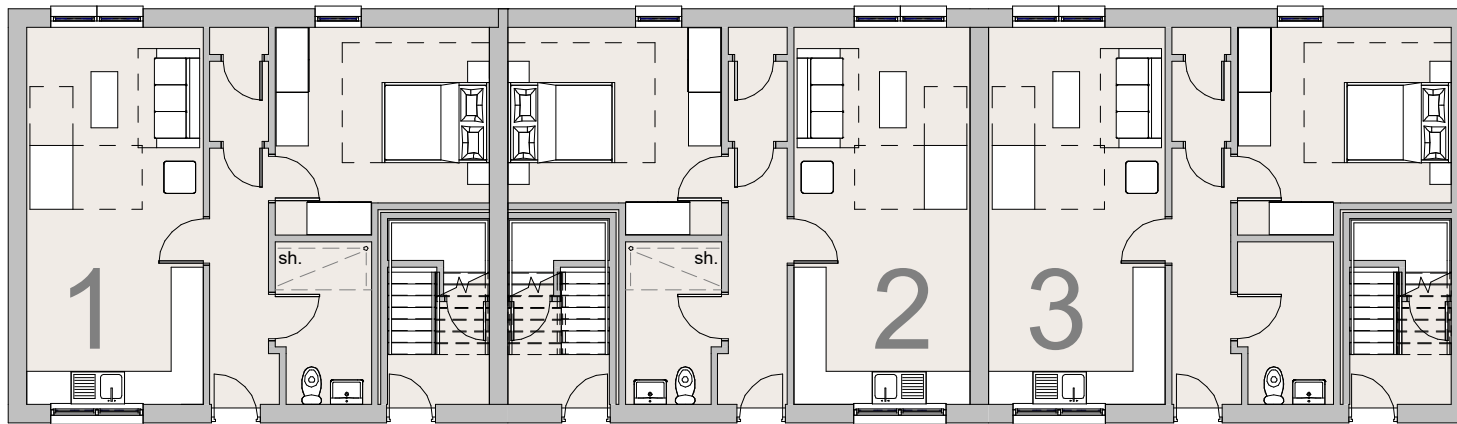
Job No: 4492 Sheet No: A-00-100 Revision:

ISO 14001 : 2004 ISO 9001 : 2000 RIBA Chartered Practice
Please consider the environment before printing this document

Feasibility Study
15 June 2020
drawing no.4



First Floor
1 : 100



Ground Floor
1 : 100

1B2P 3-Block Terrace

Feasibility Study
15 June 2020
drawing no.5

Checker FIRST ISSUE
Rev Date Check Description

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Project
Housing Concepts
Willmott Dixon
Caerphilly
Title
House Type 1B2P - Mirrored Arrangement
Status
Concept
Scale at A3
1 : 100

Job No	Sheet No	Revision
4492	A-00-501	

ISO 14001 : 2004 ISO 9001 : 2000 RIBA Chartered Practice
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First Floor
1 : 100



Ground Floor
1 : 100

Rev	Date	Check	Description
-			CheckerFIRST ISSUE

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Project	
Housing Concepts Willmott Dixon Caerphilly	
Title	
House Type 1B2P - Mirrored Arrangement	
Status	Scale at A3
Concept	1 : 100

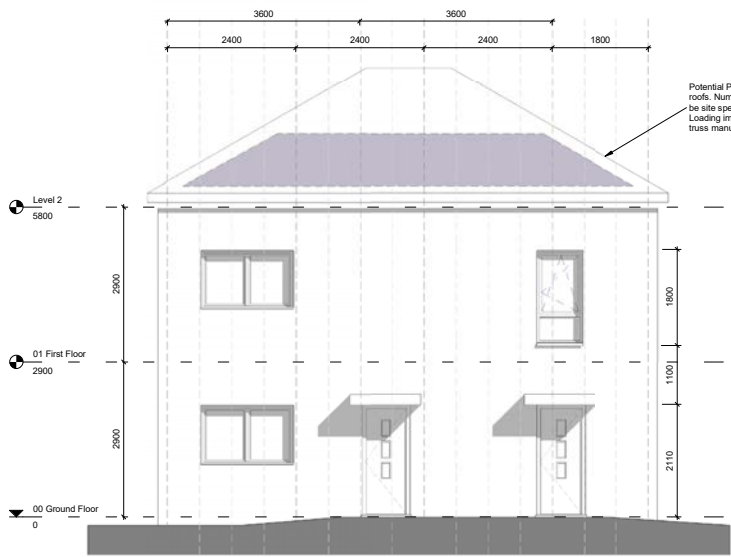
Job No	Sheet No	Revision
4492	A-00-502	

ISO 14001 : 2004 ISO 9001 : 2000 RIBA Chartered Practice
Please consider the environment before printing this document
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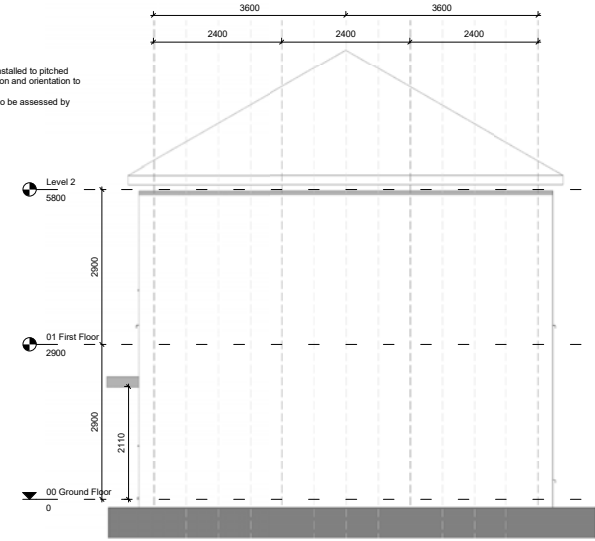
Feasibility Study
15 June 2020
drawing no.6

1B2P 4-Block Terrace

HOUSE TYPE 01

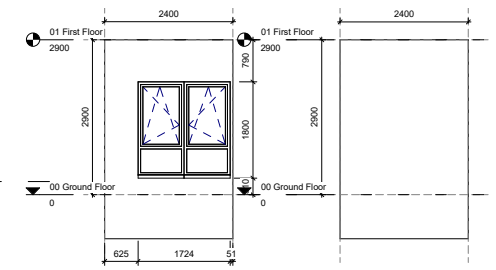


Front Elevation
1 : 50



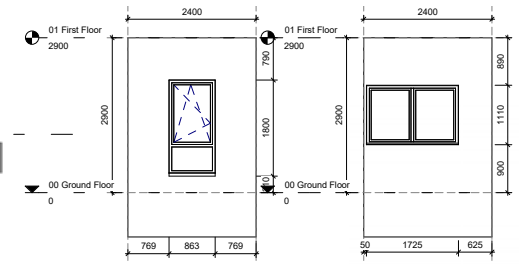
Side Elevation 1
1 : 50

Potential Wall Modules *Based on 2.4m long module



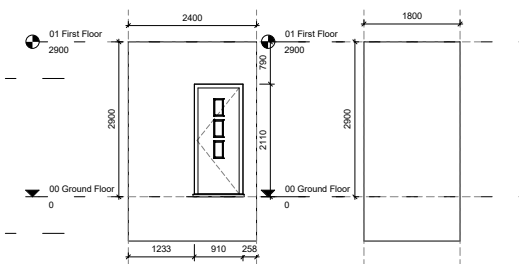
Wall Panel A
1 : 50

Wall Panel B
1 : 50



Wall Panel C
1 : 50

Wall Panel D
1 : 50

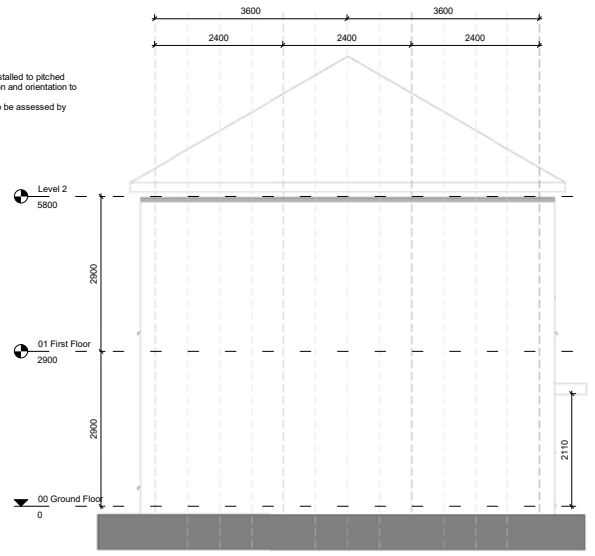


Wall Panel E
1 : 50

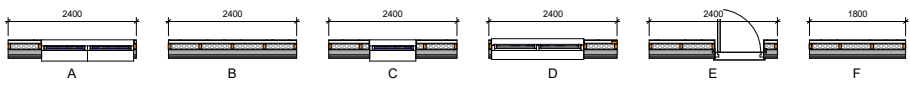
Wall Panel F
1 : 50



Rear Elevation
1 : 50



Side Elevation 2
1 : 50



Potential Wall Modules
1 : 50

- General notes / observations:**
- No electrical distribution board shown / intergration with external envelope to be considered. Is it possible to have meters / distribution away from the facade?
 - Elevation proposals do not show finish face of cladding (wall thickness' is correct to date, but cladding hatches etc.. have been removed).
 - Elevations do not show any RWPs / outlets etc.. these would need to be intergrated into any SAB information - potential to drain into raised rainwater gardens?
 - Bin stores assumed to be external to main building envelope but would be site specific.

Feasibility Study
15 June 2020
drawing no.7

Checker:FRST ISSUE

Rev	Date	Check	Description

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Project: Housing Concepts
Wilmott Dixon
Caerphilly

Title: House Type 1 (1B2P) Elevations

Status: Concept Scale: A1
Revision: 1 : 50

Job No:	Sheet No:	Revision:
4492	A-00-200	

ISO 14001 : 2004 ISO 9001 : 2000 RIBA Chartered Practice
Please consider the environment before printing this document.
Refer to dimensions where provided - do not scale from this drawing.



Front Elevation



Rear Elevation

1B2P 3-block Terrace

Feasibility Study
15 June 2020
drawing no.8

Rev	Date	Check	Description
-		Checker	FIRST ISSUE

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Project	PH Concepts, Caerphilly Trecenydd Willmott Dixon
Title	Proposed Elevation 1B2P 3-block Terrace
Status	Sketch
Scale at A3	1 : 100

Job No	Sheet No	Revision
4492	SK-00-01	

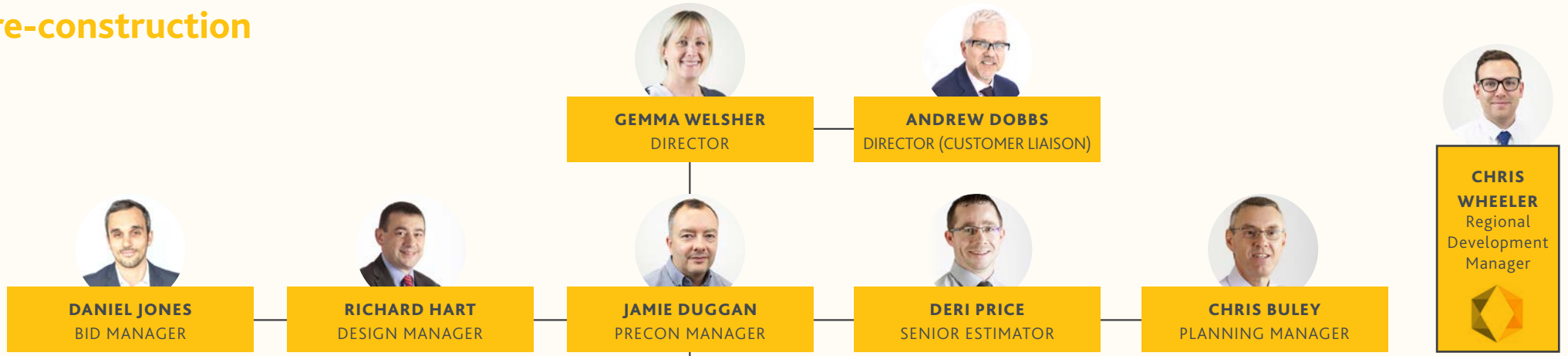


7

The Team

7 The Team

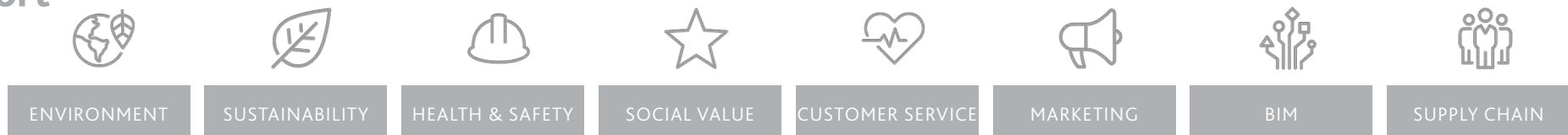
Pre-construction



Construction



Support



7 The Team

Design Team

Architect

HolderMathiasarchitects



CRAIG JONES
DESIGN LEAD

Civil Eng and Structures

CAMBRIA
Constructive Thinking



GARY MITCHELL
DESIGN LEAD

MEP

HURLEY



SIMON LUFF
DESIGN LEAD

Passivhaus Consultant

 **WARM:**



KARL PARSONS
LEAD

Planning Consultant

 **asbri**planning



BARRI DAVIES
LEAD

7 The Team

Practice Profiles

**HMA:
architecture**

HolderMathiasarchitects

Holder Mathias has created projects of enduring value for over fifty years. Their reputation is built upon high quality sustainable design within identified commercial constraints, aligning with their customer's' objectives and success criteria.

The Cardiff team have embraced this project and are passionate about delivering a sustainable housing product for the local welsh market.

Based in London, Cardiff and Munich, Holder Mathias operates throughout the United Kingdom and internationally delivering services in Architecture, Urban Design and Masterplanning.

Holder Mathias offer an integrated approach to residential and mixed use development. Combining specialist expertise in retail and leisure design they create places that people are drawn to and, using skills in urban residential development, they design high quality environments for people to live and work.

Whether providing strategic advice on complex mixed use schemes, specialist leisure design expertise, or technical resources for construction; Holder Mathias brings a powerful combination of creativity, commercial awareness, commitment and capacity to deliver.

**Cambria Consulting:
structures and civil
engineering**

CAMBRIA
Constructive Thinking

As local experts in engineering, Cambria's residential projects involve developments for private and public sector clients who are looking to develop their sites as economically as possible; to maximise their gain or to simply to deliver new housing stock within their available budget.

Cambria have delivered high and low rise residential developments including those for open market private sale for the national housebuilders as well as for smaller local developers, social housing associations, student accommodation units and residential care homes. In order to deliver the most cost effective build solution on all their projects they will usually design and detail several alternative structural options such as traditional masonry construction, timber frame and also various hybrid solutions so customers are able to establish which option suits them best in terms of overall cost and their optimum construction period.

Most residential projects involve sites which are affected by some form of abnormal works; contaminated ground, SUDS, or drainage capacity issues which frequently involve the Engineering design of the works. Cambria will work closely with the Caerphilly CBC SAB Officers and Willmott Dixon costing team to establish what these risks are and how best to either avoid them or minimise their impact on the financial viability of the project.



**FP Hurley: mechanical and
electrical engineering**

HURLEY

F P Hurley provides a complete MEP package, working with customers and main contractors from project conception right through to handover and extended aftercare. They specialise in the design, supply, installation, testing and commissioning, as well as the aftercare of mechanical and electrical services. Their strong local delivery teams contain the right blend of people from the pre-construction and construction phases to ensure customer satisfaction.

The FP Hurley team have embraced the low energy aspects of this project and have collaborated in developing the design to date.

7 The Team



WARM



WARM are nationally recognised energy consultants responsible for a huge range of Passivhaus and low energy developments from large scale commercial to self-build; their collective experience is currently unrivalled in the UK.

They assist in designing services to match a low energy building shell. They promote design services that are simple, easy to understand and reflect the fabric-first approach. Understanding both the fabric and the services means a building that dove-tails beautifully.

They are Passivhaus certifiers, and have certified over 200 buildings to the standard, priding themselves on helping the team through the certification procedure.

On this project WARM have assisted on the product design development to date and will remain as consultants during the detailed design development.

Asbri Planning



From single dwellings through to major housing developments and Extra Care residential schemes, Asbri Planning has vast experience across the entire residential sector. Their clients include national housebuilders, Housing Associations, local developers and individuals.

Through extensive experience in this sector, Asbri Planning are able to provide sound advice in respect of the issues and factors that define a successful residential development. They have worked across Wales and the south of England, so are often able to call upon contacts and provide bespoke advice on residential development based on known traits and characteristics of specific Local Planning Authorities.



7 The Team



IAN JONES

20+

MCIQB
OPERATIONS DIRECTOR

Ian will have board-level responsibility providing local and accessible contact at board level.

Ian will oversee this successful team to deliver the customers innovative residential vision - whilst maintaining the strategic objectives of the programme and budget.

He will oversee the implementation of the Willmott Dixon procedures and adherence to legislation, will challenge and interrogate project KPI's and progress and he will instigate corrective action as required.



MARTIN BENNETT

15+

MCIQB, BSc
OPERATIONS MANAGER

Martin will oversee the entire project to ensure its delivery to the strict budget and programme.

Martin will be the primary senior management contact throughout the project, working closely and reporting to Ian Jones as Project Director. Throughout the PCSA stage Martin will contribute to the design development and influence programme, buildability and our proposed supply chain partners' early involvement. He will maintain the close engagement through to construction and handover ensuring focus on key objectives.



GERWYN NEALE

15+

BSc
COMMERCIAL MANAGER

Gerwyn will provide commercial expertise and the management of the surveying element of the project to ensure that the subcontract packages are procured and delivered within budget and to the highest standard.

Any client changes will be dealt with by Gerwyn. He will provide the required quotes and programme implications to allow timely decision to be made and will be responsible for producing monthly financial reports. He will promote the company partnering values; treating the customer relationship as our most valued asset.



ASHTON RISE HOUSING, BRISTOL

The development is the first of its kind for Bristol City Council, with the council building homes for sale on the private market for the first time. The mixed tenure development will feature 40% affordable homes for the city, available for social rent.



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ISLWYN HIGH SCHOOL

Design and construction of new 1000 pupil facility with a 50 place ALN/SSRB unit. The new building rationalises and replaces two existing schools.

7 The Team



JAMIE DUGGAN
MCIQB, BSc
PRECONSTRUCTION MANAGER

15+

Jamie will oversee the design and pricing management process through the PSC stage and will remain with the project for 8 weeks once the project moves to site.

Jamie is committed to collaborative delivery of a fully consulted design process that allows CCBC and all stakeholders to have a controlled input into the design, maintaining strategic budget and programme.



ISLWYN HIGH

Design and construction of new 1000 pupil facility with a 50 place ALN/SSRB unit. The new building rationalises and replaces two existing schools.



DANIEL JONES
BSc
BID MANAGER

10+

Dan's role will be to manage and lead the day-to-day activities of the second stage bid period, working closely with Martin Bennett to develop strategies, programmes and logistics to ensure efficient and best value delivery.

Ensuring smooth transition from the pre-construction team to the operations project team.



HSDU

The HSDU will be a purpose built unit which will provide an efficient and flexible service of medical device decontamination and sterilisation to healthcare facilities.



RICHARD HART
BSc
DESIGN MANAGER

15+

Richard's role will be to lead and manage the design process for Caerphilly, ensuring a professional, coordinated approach within a BREEAM excellent design framework.

Richard will ensure that the outputs from the design team meet the technical and commercial requirements of the project. He will lead the engineered value process.



TAFF VALE REDEVELOPMENT

A significant step in the regeneration of the Pontypridd. The project includes 3 new multi-storey buildings, housing local authority offices, retail space, library, cafe & gym.



DERI PRICE
MCIQB
SENIOR ESTIMATOR

45+

Deri we will work alongside our principal estimator, design manager and bid manager to develop the pre-construction procurement strategies.

He will efficiently break down works packages to suit a best value/competitive procurement model for the client, ensuring the costings are robust and accurate.



IDRIS DAVIES SCHOOL

Construction of a new primary school within the existing grounds of Rhymney Comprehensive School to replace and combine the existing Abertyswg & Pontlottyn schools.



CHRIS BULEY
MCIQB, BSc
PLANNING MANAGER

20+

Chris will be responsible for all Pre-Construction planning. He will work closely with all team members to progressively develop a robust and efficient construction programme.

Coordinating the design team and supply chain to ensure resources are available during the pre-construction and operations phase.



ASHTON RISE HOUSING, BRISTOL

The development is the first of its kind for Bristol City Council, with the council building homes for sale on the private market for the first time.



8

Company
Ethos

8 Company Ethos



Social Value

The triple bottom line of people, planet and profit is embedded in our company vision and culture and is fundamental to the way we run an efficient business, delivering value.

We also understand the implications of the Wellbeing of Future Generations Act and the requirements to demonstrate adherence to the 7 Goals of the Act. The design of this housing product, and in the way it will be delivered at site, will provide evidence to support Welsh Government’s requirements.



These principles drive us to create buildings of exceptional quality where extraordinary things happen. They engender an open mind-set of learning from success and failure, striving to be better each day serving you, our customer and ensuring that our priorities reflect the Caerphilly CBC vision.

Our Construction Strategy, Building on Better continues a journey to put you at the heart of all that we do.



This collaborative strategy focuses on six key pillars: Our Customers, Our People, Our Product, Our Legacy, Our Supply Chain and Our Growth all of which are focused on achieving the objectives of our customer. We support you with honesty and openness right from the start, adopting a solutions based approach and engineering the best possible outcomes in an open book accounting environment.

We have a Customer Feedback process to establish where we can improve by asking, listening and responding. This feedback is shared nationally via a portal and lessons learnt are implemented via our innovation and improvement teams. All issues are treated as opportunities to learn.

We actively manage expectations and timelines; our people and supply chain are selected to deliver quality and professionalism. We tackle issues early and adopt a “do it once, do it right” philosophy to achieve zero defects on every project.



To ensure a beneficial legacy, every project is tasked with delivering a positive and memorable impact. This is achieved by:

- Helping our customers to save money that can be reinvested
- Supporting local economies by creating opportunities
- Engaging with supply chain partners aligned to our values and beliefs
- Changing young peoples’ lives with skills training and apprenticeships
- Delivering and supporting community engagement activities
- Ensuring sustainability is at the heart of all operations to successfully meet
- Targets for waste minimisation and carbon neutrality



Willmott Dixon are worlds apart from any other contractor have previously dealt with. In my opinion, Willmott Dixon is the market leader in the customer service experience; first class service, thank you.

John Lambert, Facilities Manager, Jones Lang Laselle



8 Company Ethos

Community Benefits

The community benefits and wider social value delivered on this project will compliment and support the values and culture of Caerphilly CBC.

Willmott Dixon will plan their work via the social value account and pick out key drivers that relate to the national themes, outcomes and measures.

Some key themes Willmott Dixon believes will be valuable to Caerphilly CBC are:

Local skills and employability

We will seek to provide opportunities for socially inactive individuals through recruitment and mentoring programmes. We have a proven record of successfully recruiting long term unemployed, NEET and rehabilitating offender's and would propose that we deliver our Building Lives Mentoring Programme.



BUILDING LIVES

LEARN • DEVELOP • SUCCEED

CASE STUDY

NEET MENTORING PROGRAMME: A PROGRAMME DESIGNED TO HELP YOUNG ADULTS

We have developed a mentoring programme designed at helping young people who are not in education; employment or training (NEET) develops skills for employment. The programme comprises a mixture of classroom-based learning and activities and opportunities to visit live construction sites to see what they've learnt in action.

To date, the programme has helped to transform the futures of 69 young people aged 16-24 through offering an array of support structures; personal development, and employability skills. Individuals we have supported ordinarily would not receive support due to personal and demographic circumstances. Through collaboratively working with the customer and Job Centre Plus, Willmott Dixon have sourced individuals most in need of the engagement, support and training.



8 Company Ethos



Healthier, safer and more resilient communities

Initiatives aimed at reducing crime, donations in kind to local community projects, volunteering time provided to support local community projects.

A Social Value workshop will be proposed at the beginning of the project. This will allow us to gain a focus for our community benefits which align with Caerphilly CBC.

We will seek a beneficiary for a legacy project where we will invest time and resources into a project which will leave a tangible benefit long after the project completes.

These are initial ideas and can be changed or ratified after our social value workshop we will hold with Caerphilly CBC project officers and their selected stakeholders during the preconstruction stage.

The Willmott Dixon Foundation is passionate about our purpose beyond profit ethos. We provide community benefits on every project developed even if it's not a requirement of the contract. As this project is procured through Scape there is a social value KPI structure which we will complete with experience and enthusiasm.





9

Next Steps

9 Next Steps



Please see overleaf the PCSA contract that will enable continuation into the following pre-construction stage.

Pre-construction Services Delivery Agreement

(Professional Services Contract)

THIS AGREEMENT is made on 201[]

BETWEEN:

(1) **Caerphilly County Borough Council of Tredomen Park, Ystrad Mynach, Hengoed, CF82 7PG (the 'Employer')**

AND

(1) **Willmott Dixon Construction Limited** whose registered office is at **Spirella 2, Icnkield Way, Letchworth, Garden City, Hertfordshire, SG6 4GY (the 'Contractor')**

for the Services of **Pre-construction, Design and other Professional Services to complete RIBA Stages 1–4.**

Whereas:

This Delivery Agreement is made pursuant to the Framework Agreement dated 1st June 2017 made between Scape Procure Limited and the Contractor (the 'Framework Agreement') and incorporates those provisions of the Model Delivery Agreement set out in Schedule 8 to the Framework Agreement.

When using the Professional Services Contract, the Contractor (as stated in the Framework Agreement) is the party named as 'Consultant'.

IT IS AGREED as follows:-

1. **The Contractor's obligations**

The *Contractor* provides the services and comply with his obligations, acting as the *Consultant* in accordance with the conditions of contract set out in the Contract Data herein.

2. **The Employer's obligations**

The *Employer* pays the amount of money and complies with its obligations in accordance with the conditions

Contract Data: Part One – Data provided by the *Employer*

1. General

The *conditions of contract* are the core clauses and the clauses for main Option A, dispute resolution Option **W2** and secondary Options [X1], **X2**, [X4, X5, X7], **X8, X9, X10, X11**, [X12, X13, X18, Y(UK)1,] **Y(UK)2, Y(UK)3** of the NEC3 Engineering and Construction Contract April 2013.

- The *Employer* is

Name	Caerphilly County Borough Council
Address	Tredomen Park, Ystrad Mynach, Hengoed, CF82 7PG
Telephone	tbc
E-mail address	tbc

- The *Adjudicator* is

Name	tbc
Address	tbc
Telephone	tbc
E-mail address	tbc

- The *services* are the management of the preconstruction services and design processes detailed in the Framework Agreement and the Architectural design, Structural Engineering design, Building Services design, Principal Designer services.
- The Scope is in:

As contained in the Framework Agreement Schedules 3, 6, 7 and 12, for RIBA Stage 1 to 4 and:

Under Schedule 12 SC2.1, the purpose for which the Employer has the right to use material provided by the Consultant is to provide a police custody facility and associated office spaces.

To provide the following surveys and assessments:

TBA

Any further surveys or assessments required in order to undertake and complete the Services will be subject to an Employer instruction.

To provide the following warranties using the form set out in the Framework Agreement Schedule 14 with amendments as allowed therein:

Warrantors:

[]

[]

[]

Beneficiaries:

[]

Project Brief

To design a Passivhaus housing solution on 2 undeveloped sites within the Caerphilly County Borough, these being Trecenydd and Trethomas.

The houses will need to provide:

- []
- []
- []
- []

Schedule 12 (Template Scope) is deemed to be included in the Scope.

- The *language* of this contract is English
- The *law* of the contract is the law of England and Wales
- The *period for reply* is **2** weeks
- The *period for retention* is **12** years following Completion or earlier termination
- The *Adjudicator nominating body* is **the Royal Institution of Chartered Surveyors**
- The *tribunal* is **the Courts of England and Wales**
- The following matters will be included in the Risk Register **to be developed during the preconstruction services**

2. The Parties' main responsibilities

- The *Employer* provides access to the following persons, places and things

access to	access date
.....
.....
.....
.....

3. Time

- The starting date is **to be agreed**
- The *Consultant* submits revised programmes at intervals no longer than **5 Weeks**

4. Quality

- The quality policy statement and quality plan are provided within **2 weeks** of the Contract Date.
- The *defects date* is **12 weeks** after Completion of the whole of the *services*.

5. Payment

- The *assessment interval* is monthly
- The *currency* of the contract is **the pound sterling**
- The *interest rate* is 3% per annum above the base rate in force from time to time of the Bank of England.

6. Indemnity, insurance and liability

- The amounts of insurance and the periods for which the *Consultant* maintains insurance are

event	cover	period following Completion of the whole of the services or earlier termination
Professional Indemnity Insurance - failure of the <i>Consultant</i> to use the skill and care normally used by professionals providing services similar to the <i>services</i>	£5,000,000 in respect of each claim, without limit to the number of claims or series of claims arising out of the same original cause or source (or equivalent), without limit to the number of claims, with lower annual and/or annual aggregate limits of cover in respect of pollution and contamination related claims and similar where such limited cover is the norm	12 years
death or bodily injury to a person (not an employee of the <i>Consultant</i>) or loss of or damage to property resulting from an action or failure to take action by the <i>Consultant</i>	£10,000,000 on an 'each and every claim basis	12 years
death or bodily injury to employees of the <i>Consultant</i> arising out of and in the course of their employment in connection with this contract	The greater of the amount required by the applicable law and £10,000,000 on an 'each and every claim basis'	12 years

- The *Employer* provides the following insurances
- Insurance for all existing buildings and property existing within the Site or at the sole discretion of the *Employer* he may elect to 'self-insure' such existing buildings and property and in doing so accepts all of the *Employer's* associated risks arising out of or in relation to such 'self-insurance'. In accordance with an *Employer's* decision to 'self-insure' they do not accept any additional insurance premium/cost from the *Contractor n/a*

.....
.....

- The *Consultant's* total liability to the *Employer* for all matters arising under or in connection with this contract, other than the excluded matters is limited to

£50,000.00.....

Optional statements (The following optional clauses apply)

If the *Employer* has decided the *completion date* for the whole of the *services*

- The *completion date* for the whole of the *services* is **tbc.**

If no programme is identified in part two of the Contract Data

- The *Consultant* is to submit a first programme for acceptance within **2** weeks of the *Contract Date*.

If the *Employer* has identified work which is to meet a stated *condition* by a *key date*

- The *key dates* and *conditions* to be met are

<i>condition</i> to be met	<i>key date</i>
1
2
3

If Y(UK)2 is used and the final date for payment is not 14 days after the date when payment is due

- The period for payment is **14** days

If the *Employer* states any *expenses*

- The *expenses* stated by the *Employer* are

Item	amount
.....
.....
.....
.....

If Option A is used

- The *Consultant* prepares forecasts of the total *expenses* at intervals no longer than **4** weeks.

If Option X1 is used

- The proportions used to calculate the Price Adjustment Factor are:
0.... linked to the index for.....

[Proportion to be agreed on a project specific basis]

The *base date* for indices is ***[To be agreed on a project specific basis]***
The indices are those prepared by ***[To be agreed on a project specific basis]***

Option X2

- The *law of the project* is the law of England and Wales

If Option X5 is used

- The *completion date* for each *section* of the services is

<i>section</i>	<i>description</i>	<i>completion date</i>
1.
2.
3.

If Option X5 and X7 are used together

- Delay damages for each *section* of the services are

<i>section</i>	<i>description</i>	<i>completion date</i>
1.
2.
3.
Remainder of <i>services</i>		

If Option X7 is used (whether or not Option X5 is also used)

- Delay damages for Completion of the whole of the *services* are **£Nil** per day

Option X8

- The *collateral warranty agreements* are

<i>agreement reference</i>	<i>third party</i>
.....
.....
.....

If Option X10 is used

- The *Employer's Agent* is

Name

Address

- The authority of the *Employer's Agent* is all actions by the Employer stated in this contract except clauses 51, 90, 91 and 92.

If Option X12 is used

- The *Client* is
Name
Address
- The *Client's objective* is
- The Partnering Information is in

If Option X13 is used

- The amount of the performance bond is

If Option X18 is used

- The *Consultant's* liability to the *Employer* for indirect or consequential loss is limited to the higher of
☐ £ of
○ 120% of the tendered total of the Prices subject to a maximum of £
- The *Consultant's* liability to the *Employer* for Defects that are not found until after the *defects data* is limited to the higher of
☐ £ of
○ 120% of the tendered total of the Prices subject to a maximum of £
- The end of liability date is **12 years** after Completion of the whole of the services (unless the Delivery Agreement is executed under hand in which case the end of liability will be **6 years** after Completion of the whole of the services).

If Option Y(UK)1 is used and the Employer is to pay any charges made and is paid any interest paid by the project bank

- The *Employer* is to pay any charges made and is paid any interest paid by the *project bank*.

If Options Y(UK)3 is used

- Term person or organisation
.....
.....

.....
.....
.....

.....
.....
.....

If Options Y(UK)1 and Y(UK)3 are both used

- Term person or organisation

The provisions of Option Y(UK)1

Named Suppliers

Option Z

The additional Conditions of Contract are:

1 General

1.1.1.1 Insert the following further definitions:

“11.2(5) “Data Protection Legislation” means:

- (i) unless and until the GDPR is no longer directly applicable in the UK, the General Data Protection Regulation ((EU) 2016/679) and any national implementing laws, regulations and secondary legislation, as amended or updated from time to time, in the UK; and then
- (ii) any successor legislation to the GDPR or the Data Protection Act 1998;”

“11.2(6) “Data Subject” has the meaning given to it in the Data Protection Legislation.”; and

“11.2(11) “Personal Data” has the meaning given to it in the Data Protection Legislation,”

1.1.1.2 The existing provisions of clause 11.2 as amended by Schedule 8 of the Framework Agreement shall be renumbered accordingly.

1.1.2 Insert a new clause 19 (Data Protection Legislation):

- 11.2 (2) Add further bullet point:
- provided or procured all Collateral Warranties which the *Consultant* is then obliged under this contract to provide or procure;
- 11.2(26) Insert a new definition:
- ‘Framework Agreement’ is the framework agreement between Scape Procure Limited and the *Consultant* dated 1st June 2017
- 12.4 Insert at the end:
- ‘provided that Clauses 20 (Convictions), 26 (Statutory Requirements), 27 (Competition Law, Corrupt Gifts and Payments), 28 (Modern Slavery Act), 30 (Confidentiality and Freedom of Information), 33.1 (Intellectual Property Rights), 33.2 (Miscellaneous: personal data) and 33.13 (Miscellaneous: whistle blowing) of the Framework Agreement shall be incorporated into this contract, mutatis mutandis, as if references to ‘Scape’ were to ‘*the Employer*’ and references to the ‘Agreement’ were to ‘*the contract*.’
- 12.5 Insert a new clause 12.5:
- A reference to any statute, enactment, order, regulation or other similar instrument shall be construed as a reference to the statute, enactment, order, regulation or instrument as amended by any subsequent statute, enactment, order, regulation or instrument or as contained in any subsequent re-enactment of it.

“19 (Data Protection)

- 19.1 Both Parties will comply with all applicable requirements of the Data Protection Legislation. These clauses are in addition to, and does not relieve, remove or replace, each Party's obligations under the Data Protection Legislation. It is agreed that:
- 19.2 Without prejudice to the generality of clause 19.1, both Parties will ensure that it has all necessary appropriate consents and notices in place to enable lawful transfer of any Personal Data to each other for the duration and purposes of this agreement.
- 19.3 Without prejudice to the generality of clause 19.1, the Contractor shall, in relation to any Personal Data processed in connection with the performance by the Contractor of its obligations under this agreement:
- 19.3.1 process that Personal Data only on the written instructions of the Employer and only as required for the purpose of the performance of this agreement;
 - 19.3.2 ensure that it has in place appropriate technical and organisational measures, reviewed and approved by the Employer, to protect against unauthorised or unlawful processing of Personal Data and against accidental loss or destruction of, or damage to, Personal Data, appropriate to the harm that might result from the unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the data to be protected, having regard to the state of technological development and the cost of implementing any measures (those measures may include, where appropriate, pseudonymising and encrypting Personal Data, ensuring confidentiality, integrity, availability and resilience of its systems and services, ensuring that availability of and access to Personal Data can be restored in a timely manner after an incident, and regularly assessing and evaluating the effectiveness of the technical and organisational measures adopted by it);
 - 19.3.3 ensure that all personnel who have access to and/or process Personal Data are obliged to keep the Personal Data confidential; and
 - 19.3.4 not transfer any Personal Data outside of the European Economic Area;
 - 19.3.5 assist the Employer, at the Contractor's cost, in responding to any request from a Data Subject and in ensuring compliance with its obligations under the Data Protection Legislation with respect to security, breach notifications, impact assessments and consultations with supervisory authorities or regulators;
 - 19.3.6 notify the Employer without undue delay on becoming aware of a Personal Data breach;
 - 19.3.7 at the written direction of the Employer, delete or return Personal Data and copies thereof to the Employer on termination of the agreement; and
 - 19.3.8 maintain complete and accurate records and information to demonstrate its compliance with this clause and allow for audits by the Employer or the Employer's designated auditor.
- 19.4 The Employer does not consent to the Contractor appointing any third-party processor of Personal Data under this agreement.”

2 The Parties' main responsibilities

21. Amend as follows:

21.2 Delete and replace with:

'The *Consultant's* obligation is to exercise (and it warrants that it has exercised) all the reasonable skill, care and diligence to be expected of a competent and appropriately qualified consultant of the professional discipline relevant to the Services being performed and who is experienced in undertaking services such as the Services in a similar timescale and also in connection with projects equivalent to the Project in connection with which the *services* are being performed.'

21.3 Insert a new clause 21.3:

'The *Consultant* checks the Scope provided by the *Employer* and satisfies itself that its own provision of the Service, including any proposals, designs and Works Information documents for a subsequent Delivery Agreement meet the Scope with no discrepancy within and or between the Scope and its own Service. Where there is ambiguity, inconsistency or conflict between these documents the Scope will prevail.'

24.5 Insert a new clause 24.5:

'The *Consultant*, in relation to any subletting of any portion of the *services*:

- procures that the relevant sub-contract contains such obligations as necessary to ensure that it is in all respects compatible with the terms of this contract and, without limitation, steps down the obligation to use the degree of skill and care specified in clause 21 and that requires collateral warranties in favour of the *Employer* to be provided in the forms specified in the Scope but with any amendments as permitted by the Framework Agreement.
- procures that all relevant sub-contracts shall be executed and delivered as a deed;
- warrants each sub-contractor's compliance with this contract's Modern Slavery Act requirements;
- warrants that all Subcontractors are fully aware of their obligations under the CDM Regulations and are fully competent and are adequately resourced to meet those obligations;
- provides to the *Employer* a certified copy of any sub-contract (save for particulars of the cost of such sub-contract *service* unless other provisions of this contract or the Framework Agreement oblige the *Consultant* to disclose them)'.

The *Consultant* does not appoint a Subconsultant or supplier if there are compulsory grounds for excluding the Subconsultant or supplier under regulation 57 of the Public Contracts Regulations 2015.

24.6 The *Consultant* includes in any subcontract awarded by him provisions requiring that:

- invoices for payment submitted by the Subconsultant or supplier are considered and verified by the *Consultant* in a timely fashion,
- undue delay in considering and verifying invoices is not sufficient justification for failing to regard an invoice as valid and undisputed, and
- any contract awarded by the Subconsultant or supplier for work included in this contract includes provisions to the same effect as these provisions.

5 Payment

51.6 Insert a new clause as follows:

‘In addition to any other legal rights and remedies of the *Employer*, whenever any sum of money is recoverable from or payable by the *Consultant* under this contract that sum may be deducted from any sum then due, or which at any time thereafter becomes due to the *Consultant* under this contract provided that the *Employer* notifies the *Consultant* in writing not later than three days before the final date for payment of the amount to be paid and the basis on which it is calculated’.

8 Indemnity insurance and liability

81.1 Amend the insurance table:

In respect of the first entry in the left hand column that starts ‘Liability of the Consultant...’ amend so that it reads:

‘Liability of the *Consultant* for claims made against him arising out of his failure to use the skill and care required by this contract.’

81.3 Insert a new clause 81.3

81.3.1 ‘The *Consultant* shall maintain professional indemnity insurance covering (inter alia) its potential liability under this contract upon market norm terms and conditions prevailing for the time being in the insurance market, and with reputable insurers lawfully carrying on such insurance business in the United Kingdom, in an amount of not less than as is stated in the Contract Data) in respect of each and every claim or series of claims arising out of the same original cause or source (or equivalent), without limit to the number of claims, save that there may be lower and/or annual aggregate limits of cover in respect of pollution and contamination related claims and similar where such limited cover is the norm for a period beginning now and ending 12 years after the date of Completion or termination of the Contract if earlier, provided always that such insurance is generally available in the market at commercially affordable rates and on terms such that prudent building consultants who undertake similar work to the *Consultant* generally carry such insurance (**‘Reasonable Rates and Terms’**).

- 81.3.2 Any increased or additional premium required by insurers by reason of the *Consultant's* own claims record or other acts, omissions, matters or things particular to the *Consultant* shall be deemed to be within Reasonable Rates and Terms.
- 81.3.3 The *Consultant* shall immediately inform the *Employer* if such insurance ceases to be available upon Reasonable Rates and Terms in order that the *Consultant* and the *Employer* can discuss means of best protecting their respective positions in respect of this contract and the service in the absence of such insurance.
- 81.3.4 The *Consultant* shall co-operate fully with any measures reasonably required by the *Employer* including (without limitation) completing any proposals for insurance and associated documents, maintaining such insurance at rates above Reasonable Rates and Terms if the *Employer* undertakes in writing to reimburse the *Consultant* in respect of the net cost of such insurance to the *Consultant* above Reasonable Rates and Terms.
- 81.3.5 When reasonably requested to do so by the *Employer* the *Consultant* shall produce promptly for inspection and or provide a copy of satisfactory documentary evidence (and a copy of an insurance broker's letter or similar certificate shall be satisfactory) that the required professional indemnity insurance is being maintained.
- 81.3.6 The *Consultant* shall notify the *Employer* in writing from time to time of any change in its professional indemnity insurance arrangements which take it outside the requirements of this contract and within seven days of the *Employer's* request at any time the *Consultant* will produce for inspection documentary evidence as to compliance with this Clause.
- 81.3.7 If the *Consultant* fails to comply with its obligations under this Clause the *Employer* may take out insurance to cover some or all of the loss or damage which could result from a breach of the *Consultant's* obligations under this contract and may recover the costs and expenses of taking out such insurance from the *Consultant* as a debt.'

9 Termination

Insert the following new clause:

90.5 The Public Contracts Regulations 2015

'The *Employer* may terminate the *Consultant's* obligation to Provide the Services if any of the provisions of paragraph 73(1) of The Public Contracts Regulations 2015 apply.

If the *Employer* terminates under the provisions of paragraph 73(1)(b) of the Public Contracts Regulations 2015 as a result of information not disclosed by the *Consultant* at the Contract Date, the procedures and amounts due on termination are the same as if the *Consultant* has substantially failed to comply with his obligations.

If the *Employer* otherwise terminates under the provisions of paragraph 73(1) of the Public Contracts Regulations 2015, the procedures and amounts due on termination are the same as if the *Employer* no longer requires the services.'

Insert new OPTION X21: CIC BIM PROTOCOL (*only applies when BIM is required*)

- X21.1 In this Option, the Protocol is the CIC Building Information Modelling Protocol, first edition 2013. Terms used in this clause are those defined in the Protocol.
- X21.2 Clauses 1, 2, 5, 6, 7 of the Protocol are *additional conditions of contract*. Clauses 3 and 4 and Appendices 1 and 2 of the Protocol are Scope.
- X21.3 The following are compensation events.
- The *Consultant* encounters an event which is outside his reasonable control and which prevents him from carrying out the work specified in clause 4.1.2 of the Protocol.

- The *Employer* revokes a licence granted under clause 6.6 of the Protocol.

Insert new OPTION X22: ELECTRONIC COMMUNICATIONS (*only applies at Employer's sole discretion*)

'The following communications shall be deemed to have no effect if made by electronic mail transmission:

- any notification of a wish to terminate this contract or the employment of the *Contractor* under it;
- any notification by the *Contractor* of his intention to suspend performance of his obligations under this contract;
- any invoking by either party of the procedures applicable under this contract to the resolution of disputes or differences;
- any agreement between the parties amending the provisions of this contract'.

Contract Data: Part Two – Data provided by the *Consultant*

Statements given in all contracts

- The *Consultant* is

Name Willmott Dixon Construction Limited.
Address Spirella 2 Icknield Way, Letchworth Garden City,
Hertfordshire SG6 4GY (registered address)
For correspondence purposes only, the Consultancy
Services are to be delivered by Willmott Dixon Local
Construction Office (LCO) – Global Reach (Wing A)
3rd Floor, Celtic Gateway, Dunleavy Drive, Cardiff,
CF11 0SN
Telephone 02920 221 022
E-mail address Jamie.Duggan@willmott Dixon.co.uk

- The key persons are

(1) Name Ian Jones
Job Director (Operations)
Responsibilities Overall responsibility for delivery of project
Qualifications MCIOB
Experience Over 20 years
(2) Name Jamie Duggan
Job Pre-Construction Manager
Responsibilities Delivery of the preconstruction services
Qualifications Bsc (Hons)
Experience Over 16 years

- The staff rates are

name /designation	rate
Project Manager (Director)	£83.27
Project Manager (Snr Prof)	£56.89
Design Manager (Snr Prof)	£56.89
Design Manager (Prof)	£29.32
BIM Manager (Snr Prof)	£38.70
Planner (Snr Prof)	£56.89
Temporary Works Manager (Snr Prof)	£56.89

Commercial Manager (Snr Prof)	£55.51
M&E Coordinator (Snr Prof)	£55.51
Principal Designer (Snr Prof)	£55.51

- The following matters will be included in the Risk Register

Risk register to be developed during preconstruction services

Optional Statements

If the *Consultant* is to decide the *completion date* for the whole of the *services*

- The *completion date* for the whole of the *services* is **tbc**

If a programme is identified in the Contract Data

- The programme identified in the Contract Data is **tbc**

Option A

- The *activity schedule* is **tbc**
- The tendered total of the Prices is **tbc**

If Option Y(UK)1 is used

- The *project bank* is
- *named suppliers* are

[The execution details for the Employer below are an example and may be amended by the Employer to suit their normal practice] Executed as a deed for and on behalf of)

[EMPLOYER])

by)

.....
Director

.....
Full name (BLOCK CAPITALS)

.....
Position/title

.....
Director/ Secretary

.....
Full name (BLOCK CAPITALS)

.....
Position/title

Executed as a deed for and on behalf of)

[CONTRACTOR])

by)

.....
Director

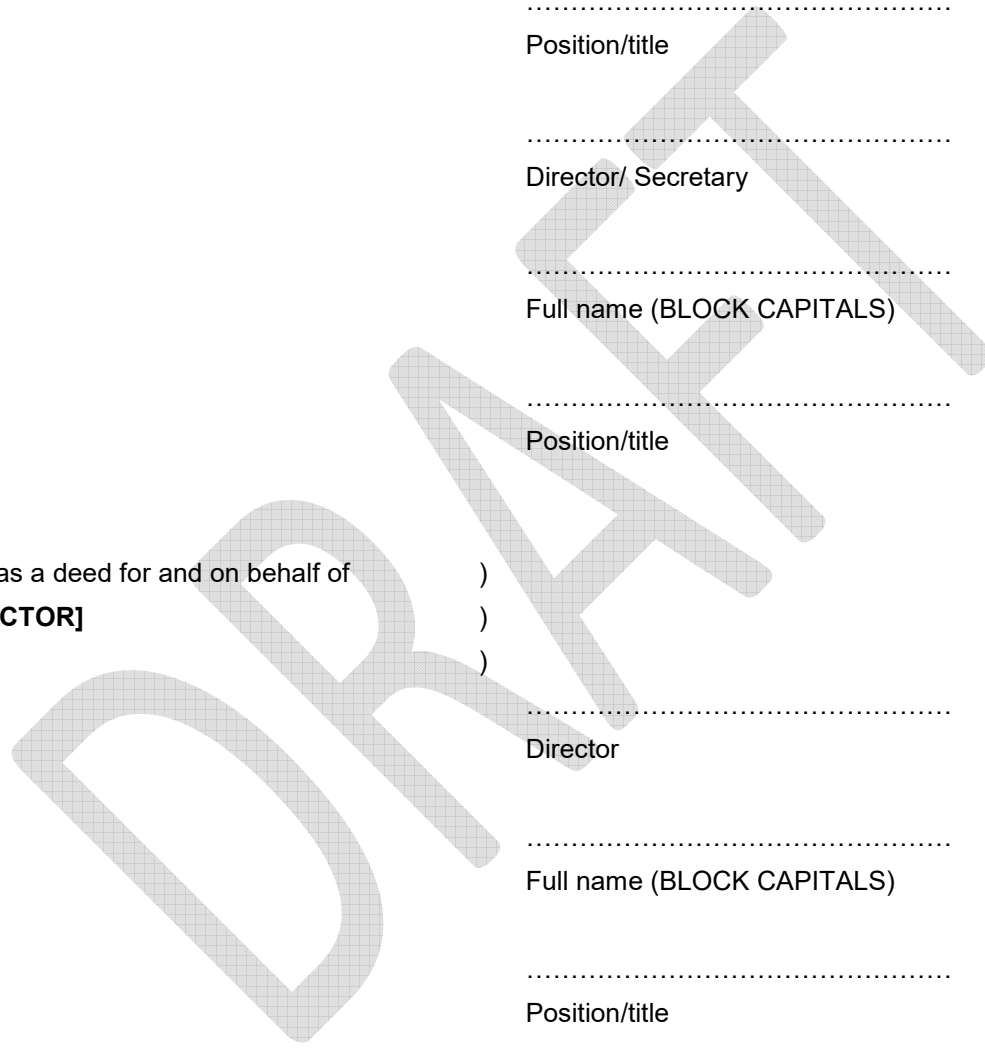
.....
Full name (BLOCK CAPITALS)

.....
Position/title

.....
Director/ Secretary

.....
Full name (BLOCK CAPITALS)

.....
Position/title



A

Appendix 1

Ashton Rise Case Study

Appendix 2

Willmott Dixon
Development Solutions



ASHTON RISE BRISTOL



CUSTOMER:
Bristol City Council

SOLUTION:
Development Management Services

CONTRACT START DATE:
8th May 2017

CONTRACT FINISH DATE:
Anticipated 15th March 2021

VALUE:
£21.2 million

PROCUREMENT ROUTE:
Scape 3 (single source)

Ashton Rise is a mixed tenure housing development of 133 new homes, with 80 homes for market sale and 53 for council housing. It is the first scheme of this nature and scale delivered by the council for over 30 years.

BENEFIT OF PROCUREMENT ROUTE USED

- Procuring through the framework provided the customer with a one stop shop for the full suite of services that they needed: design, build and development management.
- Early engagement, at concept stage, allowed the customer to benefit from our expertise from the earliest possible point.
- Enabled the gradual expansion of the scope of employment as the project progressed; the customer could appoint us in managed packages.

CUSTOMER OBJECTIVES

- To maximise the delivery of council housing on this site, in a way that was more cost effective than standard council housing programmes.
- Adopt a cross-subsidy model; to use the proceeds from the sales units to cross subsidise the provision of council houses.
- To set a benchmark for quality in Bristol.

CUSTOMER CHALLENGE

- Having never delivered a mixed tenure scheme before, the council did not have the in-house experience required to navigate the complexities of such a scheme and successfully meet their objectives.

OUR SOLUTION

- Our strategic partnership sees us utilising our construction, sales and marketing skills to successfully deliver the largest council development in many years.
- We are providing both contracting and development management services to the council, selling homes to cross-subsidise the social rent units, with sales income being used to fund the council housing.



ASHTON RISE BRISTOL

THE OUTCOME

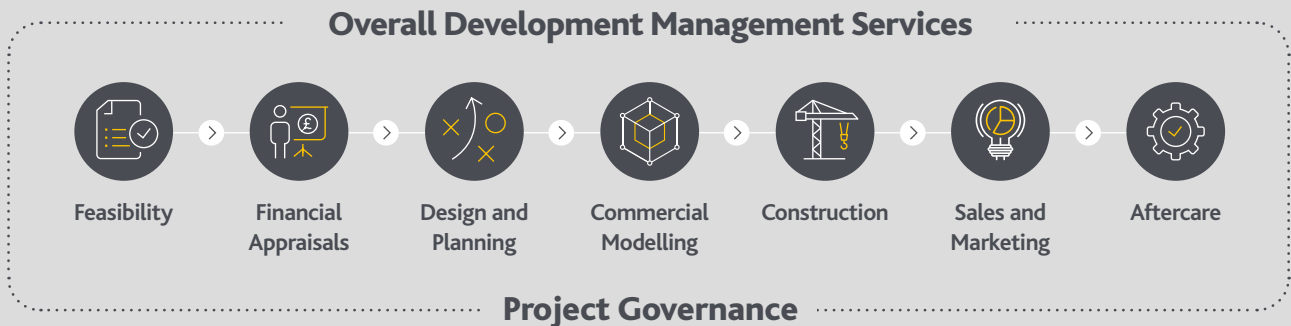
- 133 new homes built (80 for sale, 53 council houses), with all houses in the phase 1 sales release sold off plan.
- Delivered a level of council housing beyond many other developments in the city, with the proportion of council housing (40% of the units) exceeding policy requirements.
- A mix of sales units specifically driven to meet local need over best commercial performance, driven by the council retaining full control over the development. This has seen a higher proportion of 1 and 2 bed apartments delivered to meet local demand in the area.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✓ Full control of the land and all associated decisions.
- ✓ Control of timescales by directing the rate of delivery.
- ✓ Retaining all proceeds from sales income.
- ✓ One single point of responsibility across the scheme increases consistency, reduces duplication and improves working relationships.



SERVICES PROVIDED



- Alongside our design and build offer, we provided a development management service to include:
 - Market appraisal and viability analysis
 - Financial modelling
 - Sales and marketing strategy
 - Scheme concept designs
 - House type design/specifications (ensuring products most suited for market sale)
 - Achieving planning permission
 - Management of plot sales
 - Customer care for completed units.

- In order to ensure that the customer could make informed decisions about their level of investment and the tenure mix we:
 - Ran multiple commercial models looking at different tenure splits through the feasibility process
 - Profiled different density models to assess these against commercial parameters
 - Provided market intelligence and demand information
 - Marketing strategy and materials, including all site branding

- Supporting the council to set up a long term stewardship agreement with a management agent to ensure high quality and consistency
- A project board responsible for overseeing the delivery of a project which meets the council's objectives in a fully compliant way.



ASHTON RISE BRISTOL

ADDED VALUE

8.88/10

Customer satisfaction
(value for money)

76.1%

Local labour
within 40 miles

100%

Waste diverted
from landfill

96.69%

SME spend

COMMUNITY ENGAGEMENT ACTIVITIES



Coordinating the conversion of a building in central Bristol into 17 flats for homeless people.

A BENCHMARK FOR QUALITY



With an all-encompassing specification: all houses come with the same high spec finish and there are no hidden extras.

A HIGHLY SUSTAINABLE PROJECT



- All renewable energy in the form of a ground source heat pump for each unit. By integrating this new technology on a large scale residential scheme for the first time, it is being used as a benchmark for all developments in Bristol. Although it is more expensive to install, we registered it for the Renewable Heat Incentive so that the council will benefit from that income over next 20 years.
- By replacing carbon-intensive bitumen with an innovative method that uses non-recyclable plastic on site roads, we will save the equivalent of 150,000 single-use plastic bags.





WILLMOTT DIXON

SINCE 1852

Willmott Dixon

DEVELOPMENT SOLUTIONS

WHY DEVELOPMENT SOLUTIONS?

Development programmes are increasingly requiring a more innovative use of land and assets, with public and private collaboration key.

We bring together the best in construction and development specialism under one roof, working on projects from inception through to post completion. This gives an unrivaled development solution that comes from years of experience and expertise.

Our solutions set out to unlock and retain value for you – our customer.

Willmott Dixon is launching a new specialist and dedicated team who will provide a professional consultancy and a solution led service to our customers to realise and deliver a pipeline of development led opportunities.

Willmott Dixon believe in a purpose beyond profit. **We want to be a trusted partner in the delivery of social infrastructure through the values we uphold, the products we offer, the services we provide and the legacy we leave.** Development solutions is a clear route to achieving this.

We have developed a number of services and delivery models which can unlock opportunities, providing our customers with a wider solution which broadly sit across three key areas:



ASSET MANAGEMENT SOLUTIONS

Working with customers to review and unlock potential and achieve better value in their existing assets.



DEVELOPMENT MANAGEMENT SERVICES

A service led consultancy service which sits alongside our design and build offering.



FUNDING SOLUTIONS

Bringing forward alternative means of funding development to increase capacity within our partners' plans.

CUSTOMER BENEFITS

- ✓ Retain control
- ✓ Retain assets
- ✓ Unlock better commercial returns
- ✓ Provide a platform for creating longer term revenue streams to offset austerity cuts

These benefits offer real value to the customer, and provide a compelling case for the adoption and consideration of Development Solutions on relevant opportunities.

OUR MODELS AND SOLUTIONS





Unlocking value in our customers' strategic assets

What?

This sees Willmott Dixon provide development resource and expertise to review our customers' existing assets and create development solutions which support our customers' briefs, aims and aspirations.

Under this model we would review and appraise various design solutions to maximise benefits for our customers.

Such services could include:

- Identifying strategic land parcels to sell to generate revenue to cross-subsidise an identified development.
- Reviewing existing assets to develop more viable solutions.
- Identifying strategic land to acquire to unlock better potential from existing assets.

CUSTOMER BENEFITS



Generates a financially better solution by sweating their assets



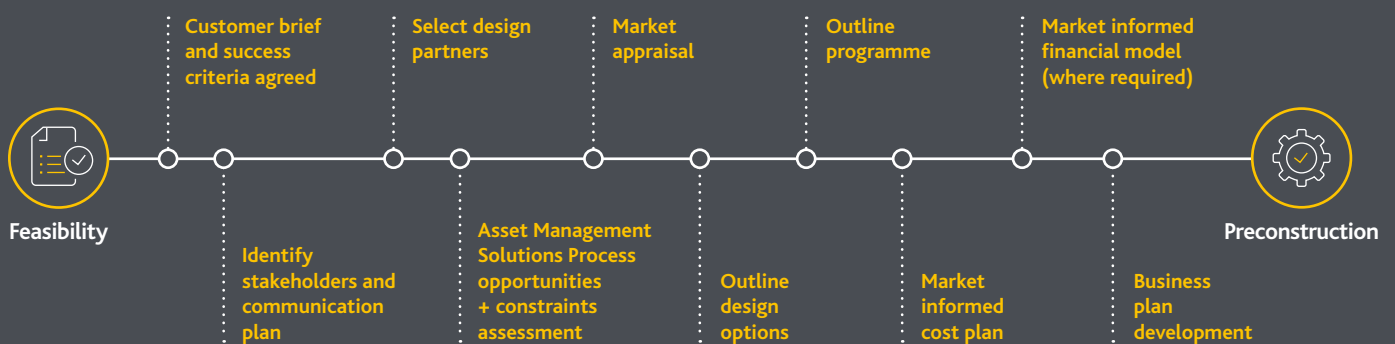
Provides a resource to customers who either do not have the resource or whose existing resources are at capacity



We can focus outcomes against their social drivers



Ensures customers retain ownership and control of their asset holdings.





DEVELOPMENT MANAGEMENT SERVICES

Delivering a flexible and tailored service to maximise development value for our customers.

What?

A service offering in which we provide a full development service, to include design and build but also sales and marketing, commercial modelling and financial appraisal work.

Our customer retains the development returns – we receive our usual construction contract plus a fee for the wider services.

The key to this service is we are not the developer – that role remains with our customer – but we provide the full range of services required to deliver a private tenure housing scheme.

CUSTOMER BENEFITS



Retain control of land/assets



Meet local needs by having control over what is built



Be in control of timescales by directing the rate of delivery



Enhanced returns by retaining developer margins

Our development management services includes:

- Scheme concept designs, house types and specifications
- Market appraisal and viability analysis
- Support with achieving planning permission
- A sales and marketing strategy
- Financial modelling
- Management of plot sales
- Customer care for completed units
- Establish estate management regime
- Create and manage project governance regime

Overall Development Management Services



Feasibility



Financial Appraisals



Design and Planning



Commercial Modelling



Construction



Sales and Marketing



Aftercare

Project Governance



FUNDING
SOLUTIONS

Enhancing capacity through funding solutions

What?

We will work with partners to identify funding requirements on projects and identify a suitable partner with whom we can work to provide a funding offer or solution.

This will include Adjuto as an option, but also look to generate wider partnerships with other funds and providers to create.

Such options could include:

- Cross subsidy models
- Grant funding solutions
- Lease and leaseback models
- Strip income models

We can also explore partnership models to design, build, finance and operate new public facilities.

CUSTOMER BENEFITS



Public sector borrowing capacity can be preserved for use on other developments.



Our cross-subsidy model can introduce flexible development partners to share risk.



Our approach can remove the requirement for an Authority to engage an external development company, thereby retaining margins.



Through Adjuto, an authority can

- Choose to act in the capacity of 'bank' and receive a market return for cash loaned into the model.
- Choose to act in capacity of 'developer' and receive a percentage of developer profit.

PROJECT CASE STUDIES





MOBERLY LEISURE & PRIME PLACE KENSAL RISE



City of Westminster

CUSTOMER:

Westminster City Council

SOLUTION:

Funding Solution – social infrastructure cross-subsidy

CONTRACT START DATE:

March 2016

CONTRACT FINISH DATE:

June 2018

VALUE:

£47 million

PROCUREMENT ROUTE:

Scape 3 (single source)

Kensal Rise is a collection of 200 beautifully designed apartments and townhouses built on top of and around the Moberly Leisure Centre which offers two pools, a 120 station gym, two exercise studios and a large eight-court sports hall.

BENEFIT OF PROCUREMENT ROUTE USED

- The council were able to access the construction and development/funding expertise of Willmott Dixon. This provided them with a free feasibility, development advice and appraisal together with funding propositions.

CUSTOMER OBJECTIVES

- To create a vibrant new residential and wellbeing hub in a central London location, combining modern city living for residents with strong connections to the wider community.
- To increase sports provision in the local area.

CUSTOMER CHALLENGE

- No capital with which to fund a new centre.

OUR SOLUTION

- Using an innovative cross-subsidy method, Moberly Leisure was delivered at a time when there was a shortfall in public spending for facilities of this scale. The facility was delivered at no cost to the public purse, with Westminster City Council land being transferred for residential development as payment.



MOBERLY LEISURE & PRIME PLACE KENSAL RISE

THE OUTCOME

- Opened in June 2018, the brand-new Moberly Sports Centre replaced the existing facility that was nearing the end of its life and becoming uneconomical to maintain.
- The centre provides two pools, a 120-station gym and two exercise studios. There is also a large eight-court sports hall with a dedicated boxing gym and a bespoke gymnastics area.
- Within its first two months of operation the leisure centre welcomed over 100,000 visitors.
- We worked with residential development specialists, Be Living (now EcoWorld London) and Westminster City Council through Scape Group's Major Works framework to cross-fund delivery of this and another nearby leisure centre for the council.

- The Moberly development's housing was called Prime Place, Kensal Rise; a collection of beautifully designed one and two-bedroom apartments and four-bedroom townhouses built on top of and around the leisure centre.
- It provides a great location for the demands of modern city living, with homes arranged around a beautifully landscaped roof garden, with many benefiting from a large balcony or private terrace.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✔ Provided a 37% increase in sports provision for the area and much needed modern facilities and importantly was delivered at no cost to Westminster City Council.
- ✔ The facility is now a net contributor to council revenue as the new fitness and leisure destination for Maida Vale.

ADDED VALUE

9/10

Customer satisfaction

77%

Local labour within 20 miles

87.5%

Local labour within 40 miles

95.5%

Waste diverted from landfill

387

School workshops

8

University research projects (Target:1)

100%

Fair payment made to supply chain within 19 days

100,000

Visitors in first two months

CHESHUNT SCHOOL BROXBOURNE



FUNDING SOLUTIONS

BE LIVING



CUSTOMER:

Be Living

SOLUTION:

Funding Solution – social infrastructure cross-subsidy

CONTRACT START DATE:

May 2015

CONTRACT FINISH DATE:

August 2017

VALUE:

£25 million Gross Development Value

PROCUREMENT ROUTE:

SID Framework

A scheme which saw the delivery of new educational facilities, funded through the development of 88 new homes on surplus school land.

BENEFIT OF PROCUREMENT ROUTE USED

- Because the framework is focused on the delivery of social infrastructure as an output of housing provision, the mini-competition process allowed us to submit plans for overall school facility improvements at Cheshunt School, which were entirely funded by the delivery of new homes.

OUR SOLUTION

- Funded the school improvements without the school having to provide any capital funding by utilising a cross-subsidy model, whereby we developed and sold 88 homes on an adjacent site owned by the school.

THE OUTCOME

- Customer objectives met via the completion of school enhancements, together with a unique development of 88 homes comprising of a mix of apartments and family homes of up to four bedrooms nestling next to Cheshunt School’s playing fields.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✓ Our customer saw vast enhancements to their own facilities without incurring any cost to themselves.

CUSTOMER OBJECTIVES

- To deliver a new technology block, remodel the main classroom block to create a new entrance lobby, staircases and new circulation route, plus an updated admin block to link with the new technology facility.
- To improve the sports fields with new changing facilities and a community sports hall with dedicated entrance and parking.

CUSTOMER CHALLENGE

- No capital with which to fund these works.

ADDED VALUE



We created a biodiversity zone at the school after they successfully applied for a Woodland Trust ‘Wildlife’ Tree Pack.

420

The Woodland Trust ‘Wildlife’ Tree Pack included 420 trees in total, consisting of various species of tree such as oak, silver birch and hazel.



The pack also contained trees such as hawthorn, rowan and blackthorn that were planted specifically to become sources of food for wildlife.



SAYER COURT LEAMINGTON SPA



CUSTOMER:
Warwick District Council

SOLUTION:
Strategic Assets Review

CONTRACT START DATE:
May 2015

CONTRACT FINISH DATE:
November 2016

VALUE:
£11.1 million

PROCUREMENT ROUTE:
Scape 3 (single source)

Sayer Court provides a stylish 76 apartment block and five separate bungalows for people over 55. This is the first housing scheme commissioned by Warwick District Council for over 30 years, creating quality new homes that replaced a scheme no longer fit for purpose.

BENEFIT OF PROCUREMENT ROUTE USED

- Enabled the council to engage Willmott Dixon to undertake a development management role in unlocking the development.
- The council benefitted from free feasibility review work to provide a platform to take the development forward. Early engagement through the framework made this possible.

CUSTOMER OBJECTIVES

- To provide a high quality retirement development for older people.
- To increase density and the number of units on offer through the scheme.

CUSTOMER CHALLENGE

- The council had limited capacity within the team with which to take the development forward.

OUR SOLUTION

- We identified and secured additional land for development.
- Re-located an existing retail unit.
- Progressed the scheme through planning.
- Undertook all design and construction works.

This scheme was developed on the site of former bedsit accommodation with the aim of enhancing the quality of accommodation available for local people. The site contained 33 bedsits plus a common room. When we were initially engaged on the scheme, the site contained numerous constraints which limited its development to circa 40 new homes.

We undertook all initial site due diligence at our risk to create a fully risk profiled development solution for the council.

In carrying out this process, we developed nine separate feasibility studies (all at risk) in order to assess the viability of different scenarios linked to land acquisition.





SAYER COURT LEAMINGTON SPA

This all formed part of our reporting processes in obtaining Cabinet approval to commit the investment required to increase the density of the scheme. In order to maximise the scheme's potential we undertook a land assembly process and negotiated the acquisition of three private land parcels including an existing public house and two private houses. This enabled a significant increase to the density of housing – almost tripling the number of units on site. The structure of this deal saw us negotiate the land purchases on behalf of the Local Authority (LA), with completion assigned to the council. We then entered into an NEC Delivery Agreement to design and build the scheme, including taking the scheme through planning. Once this Cabinet approval was obtained, we entered into conditional contracts with each land owner and subsequently took the scheme through planning, achieving a planning consent in only 11 weeks from submission, thereby ensuring a swifter start on site could be achieved. Planning was

fronted by ourselves and submitted in our name in order that reputational risk was protected from the council.

In addition, we supported the council with sales and lettings by delivering a show apartment early in our programme. We engaged a specialist interior designer and fully fitted out and apartment to enable the council to show prospective residents what the final quality would be like in order to maximise sales and lettings in the off-plan phase.

THE OUTCOME

- First housing scheme commissioned by Warwick District Council for over 30 years.
- Met local housing needs by replacing a scheme no longer fit for purpose, with purpose build accommodation.
- 76 unit apartment block with five separate bungalows all specifically designed for over 55s.
- Delivered on time and to budget.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✓ Ensuring greater value for council spend, we negotiated the acquisition of three private parcels of land to increase development capacity.
- ✓ We supported the Cabinet and board approval process to ensure approval for the investment.
- ✓ Our expert team led the planning process and secured planning consent in 11 weeks.
- ✓ We took full construction risk to ensure cost certainty for our customer.

ADDED VALUE

9/10

Client satisfaction (service)

8/10

Client satisfaction (value for money)

99%

Waste diverted from landfill

43

Considerate Constructor Score

100%

Fair payment made to supply chain within 19 days

96%

Local labour within 40 miles

88%

Local spend within 40 miles

100%

SME engagement and SME spend



ROBIN HOOD CHASE NOTTINGHAM



CUSTOMER:

Nottingham City Council
& ASRA Housing

SOLUTION:

Strategic Assets Review

CONTRACT START DATE:

March 2014

CONTRACT FINISH DATE:

March 2015

VALUE:

£3.9 million

PROCUREMENT ROUTE:

Scape 3 (single source)

A mixed use development which saw the delivery of 45 homes together with three retail units, delivered in partnership with ASRA Housing.

ADDED VALUE



COMMUNITY ENGAGEMENT ACTIVITIES

Our community engagement activities included working with Nottingham City Council's Employment Hub to provide invaluable work experience for 72 local unemployed people.



BUILDING ON STRONG FOUNDATIONS

Our site team also teamed up with trainees from the local New College Nottingham and local job seekers to create the foundations for a new building at St. Ann's Community Orchard.

BENEFIT OF PROCUREMENT ROUTE USED

- Direct call off through the framework enabled the council to procure Willmott Dixon to work up a solution for this under-utilised site and create a platform for securing two development partners to deliver the site.
- Allowed the early engagement of Willmott Dixon to undertake early feasibility review in order to create a deliverable solution for the site.
- Free feasibility through the Scape framework.

CUSTOMER OBJECTIVES

- To deliver the development in a commercially viable manner, with no residual development risk for the council.
- To create a scheme which delivered both residential and commercial (retail) uses.

CUSTOMER CHALLENGE

- Commercial viability.
- Finding a development solution for a mixed use scheme.

OUR SOLUTION

Our role saw us:

- Identify and obtain the land
- Secure and pre-sell the retail element
- Progress the scheme through planning
- Undertake all design and construction works.

This development followed an earlier phase which saw Willmott Dixon deliver a health and wellbeing centre on behalf of Nottingham City Council.

Following completion of the Wellbeing Centre, we began working with the council (who owned the land) to develop proposals for the wider site. We were able to engage in an exclusivity arrangement with the council on the land through our position on the Scape Major Works framework, giving us direct access to the land in an off-market scenario.

The deal structure saw us negotiate an exclusivity with the vendor and then assign the land completion to ASRA Housing, with Willmott Dixon subsequently entering

ROBIN HOOD CHASE NOTTINGHAM



ASSET MANAGEMENT SOLUTIONS

into a design and build contract to complete the scheme.

In developing proposals, we entered into early dialogue with the planners and carried out a series of due diligence surveys on the land (including a topographical survey and site investigation) in order to understand the full constraints of the site and develop a fully profiled land package proposal to our end client, ASRA Housing.

We undertook all initial site due diligence at our risk to create a fully risk profiled development package solution to ASRA Housing.

Following engagement with the planners, it became apparent that a mixed use scheme was required. In response we developed proposals for a scheme comprising residential and retail use.

We also shared planning risk to ensure all partners were equally bought into the principle of the development from the outset.

Using our position on the Nottingham Housing Strategic Partnership Board, we took the site to ASRA Housing as a package deal for the residential element and entered into a back-to-back arrangement to deliver

the scheme. We also led the commercial element of the project, sourcing a commercial investment partner and securing pre-sales on all three commercial units, enabling the development to successfully commence in a manner compliant with planning.

Prior to the commercial investment partner being on board, we commenced taking the scheme through planning, sharing planning risk and taking full responsibility for securing pre-sales on the commercial element.

We subsequently entered into separate build contracts with ASRA Housing and the commercial partner, providing lump sum contracts and taking full construction risk, to successfully deliver the scheme.

THE OUTCOME

- A successful mixed use development which saw the delivery of 45 homes together with three retail units.
- This development completed the wider regeneration of the area.
- It also provided much needed homes specifically designed for over 55s, addressing housing need in the area.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✔ Gained early access to the site by utilising our position on the Nottingham Housing Strategic Partnership Board.
- ✔ Site secured off-market through our position on the Scape Major Works framework, avoiding competition on the open market.
- ✔ Undertook early due diligence on the site to ensure all opportunities and constraints were understood early in the development process.
- ✔ Successfully delivered the retail element in a risk free manner to ASRA Housing by sourcing a commercial investment partner.
- ✔ Ensured community engagement was a key consideration in the development.

ADDED VALUE

100%

of supply chain paid within 30 days

90.81%

Local labour within 40 miles

99.70%

Local spend within 60 miles

655

Short courses completed

99.62%

Waste diverted from landfill

209

Apprentice weeks completed



The building is popular with natural space within the local St Ann's allotments, hosting a range of community activities, including school visits, activity days and play sessions.



SPRING BOROUGH NORTHAMPTON



CUSTOMER:
Northampton Partnership Homes

SOLUTION:
Strategic Assets Review

CONTRACT START DATE:
October 2016

CONTRACT FINISH DATE:
December 2018

VALUE:
£6.34 million

PROCUREMENT ROUTE:
Scape 3 (single source)

This project entailed the development of 34 new affordable homes (comprising 2 and 3 bed houses), a new retail unit and remodelling works to St Katherine's Court (15 storey tower block), including all external works, infrastructure and drainage.

BENEFIT OF PROCUREMENT ROUTE USED

- Enabled the council to engage Willmott Dixon to undertake a full land availability assessment in unlocking the development.
- Early engagement through the framework enabled the council to benefit from free feasibility review work to provide a platform to take the development forward.
- Significant social value was created as part of the development.

CUSTOMER OBJECTIVES

- To improve the environmental setting of the overall estate.
- To improve the energy efficiency of the existing tower block.
- To increase the provision of new homes.

CUSTOMER CHALLENGE

- Limited resources.
- Knowledge of available sites on the estate was limited.

OUR SOLUTION

- We identified and secured additional land for development
- Re-located an existing retail unit
- Took the scheme through planning
- Undertook all design and construction works.

We were initially engaged by our customer, Northampton Partnership Homes to deliver a new build scheme comprising of 18 new homes off Little Cross Street within the Spring Borough estate.

We undertook a full review of the local area to aid in our understanding of the scheme. This highlighted the potential to expand our development activities beyond this initial site. As a result, we conducted a full



SPRING BOROUGHES NORTHAMPTON

land development strategy with the aim of identifying additional sites for potential development.

As part of this exercise, we initially identified six potential sites within the estate itself which we felt offered development potential.

We then undertook title searches and planning due diligence to assess which sites were deliverable. This saw us discount three initial sites.

For the remaining three sites, we entered into dialogue with the relevant land owners to ensure the sites could be acquired and also did initial scoping work to understand the level of development achievable.

Through this exercise, we were able to secure each site and increase the development from an initial 18 new homes to 34 new homes plus the relocation of a retail unit to increase the scope of the initial site.

THE OUTCOME

- The development of 34 new homes, a new retail unit and remodelling works to St. Katherine's Court (15 storey tower block). This provided the community with much needed affordable housing.
- We also made environmental improvements to the estate, by completing all external works such as infrastructure and drainage. This improved the estate's overall external image.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✓ Ensured cost certainty for our customer by taking full construction risk.
- ✓ Successfully secured planning consent on each development site with Willmott Dixon leading the planning process.
- ✓ Increased the development potential from 18 units to 34 units, increasing the number of affordable homes we were able to provide across the estate.

ADDED VALUE

9.7/10

Customer satisfaction score

100%

BREEAM assessment rating on all new buildings

42

Considerate Constructor Score

100%

Local labour within 40 miles

100%

Local spend within 40 miles

88%

SME engagement

96%

project spend with SMEs



LIVERPOOL HOUSING PARTNERSHIP LIVERPOOL



CUSTOMER:
Liverpool City Council

PARTNERS:
Liverpool Mutual Homes
and Redrow Homes

SOLUTION:
Consortium Solution

CONTRACT START / FINISH DATE:
2015 / 2020

VALUE: £205 million
(Potential investment value)

PROCUREMENT ROUTE:
Competitive dialogue

The Liverpool Housing Partnership (LHP) is a pioneering relationship forged between Liverpool City Council, Redrow Homes, Liverpool Mutual Homes (LMH) and Willmott Dixon, delivering up to 1,500 new homes and bringing 1,000 empty homes back into use.

BENEFIT OF PROCUREMENT ROUTE USED

- It provided the council with the flexibility to create a unique partnership with a consortium of award winning partners who are committed to local investment in the Liverpool City region.

CUSTOMER OBJECTIVES

- To deliver 1,500 new homes and bring 1,000 empty homes back into use
- To deliver these homes across the entire city
- To deliver a range of tenures, including market sale and affordable housing
- To deliver a range of higher council tax band homes.

CUSTOMER CHALLENGE

- The scale of the objective was such that it was too large for any one individual organisation to deliver.
- The council had access to land, yet was not in a position to directly deliver the housing requirements through their own investment.

- The council also had a range of other partnerships in place which were not fully delivering against the housing needs of the city.

OUR SOLUTION

In response to the challenges, Willmott Dixon pulled together a consortium of partners with complementary skills and expertise and who, together, could deliver the scale of development being sought by the council.

Our approach entailed:

- A consortium of partners with expertise in land identification, planning promotion, ground remediation, construction, development, sales and marketing, housing management, customer service and aftercare.
- Development of new homes on multiple sites throughout the city, providing a city wide housing programme with a variety of housing tenures.



LIVERPOOL HOUSING PARTNERSHIP LIVERPOOL

The council provided strategic planning and housing need intelligence, as well as selling any council owned land suitable for housing to the partnership for development at market value.

Capital receipts generated by the sale of the council sites and assets were reinvested into the housing programme, to enable more families to be provided with homes.

Programme delivery was closely monitored by the partnership, with quarterly and annual reports provided to the Cabinet.

THE OUTCOME

• To date, development has commenced either on site or through the planning process of nine schemes providing over 300 new homes across a variety of tenures and uses.

• This includes Marwood Tower which has delivered 80 homes for the over 55s through the refurbishment and extension of a tower block which was no longer in use.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✓ Scale of delivery – by adopting a consortium-led approach we are able to deliver much more than our individual organisations could in isolation, thereby ensuring we could meet the council's objective of delivering 1,500 new homes, something which would have been difficult for one company to achieve.
- ✓ Platform to deliver 1,500 new homes and bring 1,000 empty homes back into use.
- ✓ Creating a £205 million investment, with potential for a further £200 million in subsequent years.

- ✓ The uniqueness of the partnership is that it is responsive to the housing market and the partners have a direct influence about where, when and the type of housing to be built in the city.
- ✓ Development of new homes on multiple sites throughout the city, providing a city wide housing programme with a variety of housing tenures.
- ✓ The partnership worked on a wide range of initiatives to tackle empty properties, including long-term voids, such as maximising voluntary action from property owners and securing funding to bring houses back into use. Areas where groups of empty properties are most heavily impacting on streets are being particularly targeted.

ADDED VALUE

8.4/10

Customer satisfaction (service)

8/10

Customer satisfaction (whole life performance)

99.53%

Waste diverted from landfill

40

Considerate Constructor Score

100%

Fair payment made to supply chain within 19 days

98.81%

Local labour within 40 miles

90.17%

Local labour within 20 miles

95.03%

Local spend within 40 miles

100%

SME engagement and SME spend

The project has delivered the following aims and objectives:

- **17** National Vocational Qualifications supported • **147** School/college/university site visits
- **300** Apprentice weeks (existing), **52** Apprentice weeks (project initiated) • **829** Short courses
- **149** School/college workshops • **38** Work experience placements • **45** University research projects supported



ASHTON RISE BRISTOL



CUSTOMER:
Bristol City Council

SOLUTION:
Development Management Services

CONTRACT START DATE:
8th May 2017

CONTRACT FINISH DATE:
Anticipated 15th March 2021

VALUE:
£21.2 million

PROCUREMENT ROUTE:
Scape 3 (single source)

Ashton Rise is a mixed tenure housing development of 133 new homes, with 80 homes for market sale and 53 for council housing. It is the first scheme of this nature and scale delivered by the council for over 30 years.

BENEFIT OF PROCUREMENT ROUTE USED

- Procuring through the framework provided the customer with a one stop shop for the full suite of services that they needed: design, build and development management.
- Early engagement, at concept stage, allowed the customer to benefit from our expertise from the earliest possible point.
- Enabled the gradual expansion of the scope of employment as the project progressed; the customer could appoint us in managed packages.

CUSTOMER OBJECTIVES

- To maximise the delivery of council housing on this site, in a way that was more cost effective than standard council housing programmes.
- Adopt a cross-subsidy model; to use the proceeds from the sales units to cross subsidise the provision of council houses.
- To set a benchmark for quality in Bristol.

CUSTOMER CHALLENGE

- Having never delivered a mixed tenure scheme before, the council did not have the in-house experience required to navigate the complexities of such a scheme and successfully meet their objectives.

OUR SOLUTION

- Our strategic partnership sees us utilising our construction, sales and marketing skills to successfully deliver the largest council development in many years.
- We are providing both contracting and development management services to the council, selling homes to cross-subsidise the social rent units, with sales income being used to fund the council housing.



ASHTON RISE BRISTOL

THE OUTCOME

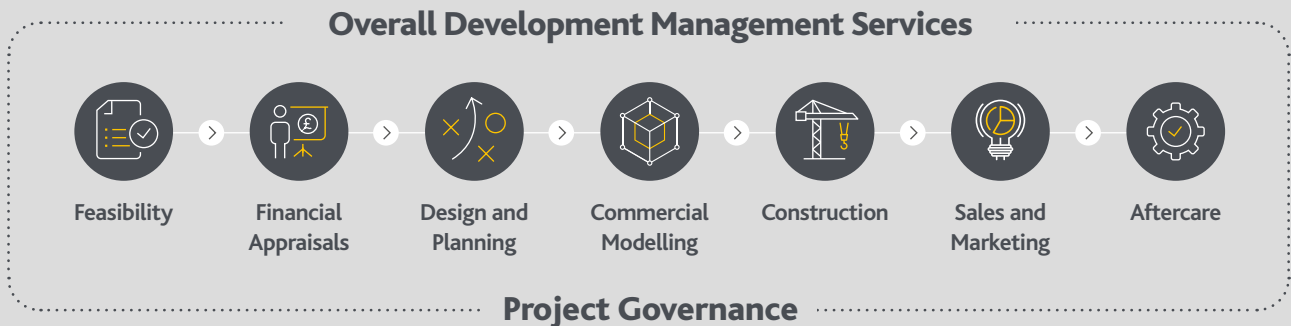
- 133 new homes built (80 for sale, 53 council houses), with all houses in the phase 1 sales release sold off plan.
- Delivered a level of council housing beyond many other developments in the city, with the proportion of council housing (40% of the units) exceeding policy requirements.
- A mix of sales units specifically driven to meet local need over best commercial performance, driven by the council retaining full control over the development. This has seen a higher proportion of 1 and 2 bed apartments delivered to meet local demand in the area.

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✓ Full control of the land and all associated decisions.
- ✓ Control of timescales by directing the rate of delivery.
- ✓ Retaining all proceeds from sales income.
- ✓ One single point of responsibility across the scheme increases consistency, reduces duplication and improves working relationships.



SERVICES PROVIDED



- Alongside our design and build offer, we provided a development management service to include:
 - Market appraisal and viability analysis
 - Financial modelling
 - Sales and marketing strategy
 - Scheme concept designs
 - House type design/specifications (ensuring products most suited for market sale)
 - Achieving planning permission
 - Management of plot sales
 - Customer care for completed units.

- In order to ensure that the customer could make informed decisions about their level of investment and the tenure mix we:
 - Ran multiple commercial models looking at different tenure splits through the feasibility process
 - Profiled different density models to assess these against commercial parameters
 - Provided market intelligence and demand information
 - Marketing strategy and materials, including all site branding

- Supporting the council to set up a long term stewardship agreement with a management agent to ensure high quality and consistency
- A project board responsible for overseeing the delivery of a project which meets the council's objectives in a fully compliant way.



ASHTON RISE BRISTOL

ADDED
VALUE

8.88/10

Customer satisfaction
(value for money)

76.1%

Local labour
within 40 miles

100%

Waste diverted
from landfill

96.69%

SME spend

COMMUNITY ENGAGEMENT ACTIVITIES



Coordinating the conversion of a building in central Bristol into 17 flats for homeless people.

A BENCHMARK FOR QUALITY



With an all-encompassing specification: all houses come with the same high spec finish and there are no hidden extras.

A HIGHLY SUSTAINABLE PROJECT



- All renewable energy in the form of a ground source heat pump for each unit. By integrating this new technology on a large scale residential scheme for the first time, it is being used as a benchmark for all developments in Bristol. Although it is more expensive to install, we registered it for the Renewable Heat Incentive so that the council will benefit from that income over next 20 years.
- By replacing carbon-intensive bitumen with an innovative method that uses non-recyclable plastic on site roads, we will save the equivalent of 150,000 single-use plastic bags.





D'URTON LANE PRESTON

FRAMEWORK
PROCUREMENT
**DEVELOPMENT
SPV SOLUTION**



CUSTOMER:
Trafford Housing Trust

SOLUTION:
Land Led Development

CONTRACT START DATE:
April 2020

CONTRACT FINISH DATE:
April 2024 (TBC)

VALUE:
£32.6 million

PROCUREMENT ROUTE:
Homes England DPP3 Framework

Mixed tenure housing development providing 250 new homes on land procured from Homes England through the DPP3 framework and to be delivered through a joint venture partnership with Trafford Housing Trust.

BENEFIT OF PROCUREMENT ROUTE USED

- The DPP3 framework gave us access to a site being disposed of by Homes England for our partner, Trafford Housing Trust (THT). Willmott Dixon's position on the framework enabled THT to have access to the site.
- Enabled Homes England the delivery of more affordable housing than a traditional approach.

CUSTOMER OBJECTIVES

- **Homes England:**
 - Achieve the highest possible land value.
 - Homes delivered at an accelerated construction pace.
 - Exchange land contracts prior to the end of March 2019.
- **Trafford Housing Trust:**
 - Access to larger development sites.
 - Ability to deliver 50% affordable housing on their schemes.
 - Be in full control of the development.

CUSTOMER CHALLENGE

- Create a housing offer which doesn't compete with surrounding development.
- Deliver a project with the completion of off-site highways works (S278) which provide access to the site.

OUR SOLUTION

- We created a joint venture (JV) with Trafford Housing Trust to give THT access to the site through our framework appointment.

THE OUTCOME

- The JV successfully bid to deliver 250 new homes over a 4 year period, providing Homes England with the most competitive land offer.
- Our solution, focussing on smaller 2, 3 and 4 bed homes was designed to not compete with surrounding new build developments, predominantly providing larger family homes.





D'URTON LANE PRESTON

BENEFITS OF OUR APPROACH FOR THE CUSTOMER

- ✔ Our partnership will allow us to deliver a scheme consisting of 50% affordable housing and 50% housing for sale, far in excess of planning policy requirements.
- ✔ Our tenure solution will enable us to deliver at an accelerated pace, a planned delivery rate of 8 homes per month (against a market average of 5 per month).
- ✔ We are making a significant contribution towards meeting local housing needs by providing a mix of homes which are currently under-supplied in the local housing market.
- ✔ The completion of off-site works (S278) enabled us to provide greater access to the site. This in turn allowed Homes England to determine greater certainty over a site start date and land value payments, as well as allowing for overall better site delivery.
- ✔ Gave THT access to a site which they would otherwise have been unable to access.

ADDED VALUE

LESSON SUPPORT FOR PUPILS



Pupils will be supported in building new habitats such as bird boxes and insect hotels for local wildlife, whilst being taught about the animals' habits and learning new skills such as basic joinery.

SAFETY TALKS FOR PUPILS



Our people will visit primary schools during assembly or class times to deliver site safety talks. These talks will be centred around the dangers children could be exposed to if they were to enter a site unsupervised.

ELECTRICAL CIRCUIT BOARD WORKSHOPS



Electrical circuit board workshops will be held to allow pupils to create sound, motion and light through building snap circuits, all whilst learning the basic principles of electronics.



To find out more about Willmott Dixon
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WILLMOTT DIXON

SINCE 1852

Caerphilly Innovation Housing

Addendum to the Feasibility

JULY 2020



Feasibility Addendum

Further to the submission of our Feasibility Report Dated June 2020 we have pleasure in enclosing further details following our presentation / review and feedback sessions.

Contractual Arrangements

The Scape Framework provides you access to projects with Willmott Dixon Construction of values between £2 - £20 million. Whilst the total for the three schemes is indicated by the report as being over this number we will have two separate contracts.

1. Trethomas (Pilot Site 1) will be the first project. – Contract Value in excess of £2M
2. Oakdale and Treceenydd – These will form the second contract and will be below the £20m threshold

The reason for this split is necessitated by the need to test the product on Trethomas first and then to obtain maximum value for money through purchasing volume by combining both Oakdale and Treceenydd as one contract.

This is perfectly in accordance with Scape procurement standards and does not put the Authority at any risk of challenge.

Pre-Construction Programme

If you were to approve the Feasibility report and instruct us for the next stage we would enter into a formal PCSA Contract. This contract would run for a little over 6 months and indicative dates are indicated within the original Feasibility Report.

Fees

Within this addendum is a detailed fee schedule for the three sites which indicates the financial commitment you would be making to get these three sites through the design stage, into planning, SAB approval and a contract sum.

We have split these into Fixed Fees and Provisional Fees. These later provisional sums are generally for surveys which at this stage we are unable to fix but are based upon our best knowledge and experience. These provisional sums could be less or in some cases not required.

Please see **Appendix 1** for summary and details for each individual site.

Development Solutions

As advised in our Feasibility Report for the Oakdale Site we will provide our Development Solutions process during the feasibility and preconstruction phase.

This service would normally attract fee of circa £33,750.00 however in order to provide financial support to the project and to show our commitment we will deliver these services **free of charge**.

The full scope of what these services include is shown within **Appendix 2**. For clarity the free of charge service covers all services within the feasibility and preconstruction period items 1 – 4.

A fee proposal for the remaining sections 5 – 6 will be agreed if required.

A

Appendix 1
Fee Schedule

Appendix 2
Willmott Dixon
Development Management
Services – Scope of Service

Appendix 1 Fee Schedule



	Pre-Construction Costs	
Design Team Fees & Surveys	Fixed	Provisional
Caerphilly Housing - Trecenydd	£54,092.84	£36,200.00
Caerphilly Housing - Trethomas	£57,980.30	£37,850.00
Caerphilly Housing - Oakdale	£346,510.00	£141,800.00
Preconstruction Design Team Fees & Surveys	£458,583.14	£215,850.00
Pre-Con and Design Management Fees		
Preconstruction Fees	£52,000.00	
Design Management Service Fee	£87,237.00	
	£139,237.00	
Total Expenditure for Preconstruction	£597,820.14	£215,850.00
	£813,670.14	

Appendix 1 Fee Schedule

Trecenydd

FEE SCHEDULE		PRECONSTRUCTION			TOTAL
		Stage 2	Stage 3	Stage 4	
Description	Fixed (F) / Provisional (P)				
DESIGN FEES					
Architect	F	£7,500		£15,000	£22,500
Principal Designer	F		£1,500		£1,500
Landscape Architects	F				£0
Structural & Civil engineers	F		£9,950		£9,950
Building Services Consultant	F		£1,750		£1,750
Acoustic Consultant including Survey and Testing	F		£1,500		£1,500
Building Control	F			£2,493	£2,493
Fire engineering consultant	F		£2,500		£2,500
Air Tightness Testing including desktop review, design review, site advice and visits	F		£1,000		£1,000
Passivhaus	F	£2,993		£2,850	£5,843
NHBC	F			£5,057	£5,057
SAB	P	£6,950			£6,950
SAB Fees	P	£10,000			£10,000
Initial Flood Risk Assessment & Drainage Strategy Report	P	£350			£350
CCTV Survey of completed Below Ground Drainage System	P	£500			£500
Topographical Survey	P	£1,500			£1,500
Existing Utility Apparatus Information (Water Main, Sewer Main, Gas Main, Electricity Main, Telecom Main, Cable TV Main)	P	£500			£500
Soil Investigation Survey (California Bearing Ratio tests, Percolation Tests, Frost Susceptibility testing & Waste Acceptance Criteria Testing, Compaction Testing, Landfill Gas Analysis, Persistent Organic Pollutants Survey)	P	£3,000			£3,000
Waste Acceptance Criteria Testing soil	P	£500			£500
Level 1 Ecological Report (includes Desk study and Extended Phase 1 habitat survey)	P	£1,500			£1,500
Acoustic Survey (Noise Impact Assessment) to support Planning Application	P	£1,500			£1,500
Traffic Impact Assessment (Transport Assessment & Travel Statement)	P	£4,950			£4,950
Highways Act 1980 (Relates to classification, maintenance and rights of all parties in public maintained and private streets)	P			£4,950	£4,950
TOTAL		£41,743	£18,200	£30,350	£90,293

Appendix 1 Fee Schedule

Trethomas

FEE SCHEDULE		Stage 2	Stage 3	Stage 4	TOTAL
Description	Fixed (F) / Provisional (P)				
DESIGN FEES					
Architect	F	£7,500		£15,000	£22,500
Principal Designer	F		£1,500		£1,500
Structural & Civil engineers	F		£11,950		£11,950
Building Services Consultant	F		£1,750		£1,750
Acoustic Consultant including Survey and Testing	F		£1,500		£1,500
Building Control	F			£3,117	£3,117
Fire engineering consultant	F		£2,500		£2,500
Air Tightness Testing including desktop review, design review, site advice and visits	F		£1,000		£1,000
Passivhaus	F	£2,993		£2,850	£5,843
NHBC	F			£6,321	£6,321
SAB	P	£7,000			£7,000
SAB Fees	P	£10,000			£10,000
Initial Flood Risk Assessment & Drainage Strategy Report	P	£1,950			£1,950
CCTV Survey of completed Below Ground Drainage System	P	£500			£500
Topographical Survey	P	£1,500			£1,500
Existing Utility Apparatus Information (Water Main, Sewer Main, Gas Main, Electricity Main, Telecom Main, Cable TV Main)	P	£500			£500
Soil Investigation Survey (California Bearing Ratio tests, Percolation Tests, Frost Susceptibility testing & Waste Acceptance Criteria Testing, Compaction Testing, Landfill Gas Analysis, Persistent Organic Pollutants Survey)	P	£3,000			£3,000
Waste Acceptance Criteria Testing soil	P	£500			£500
Level 1 Ecological Report (includes Desk study and Extended Phase 1 habitat survey)	P	£1,500			£1,500
Acoustic Survey (Noise Impact Assessment) to support Planning Application	P	£1,500			£1,500
Traffic Impact Assessment (Transport Assessment & Travel Statement)	P	£4,950			£4,950
Highways Act 1980 (Relates to classification, maintenance and rights of all parties in public maintained and private streets)	P			£4,950	£4,950
		£43,393	£20,200	£32,237	£95,830
TOTAL					

Appendix 1 Fee Schedule

Oakdale

FEE SCHEDULE					
Description	Fixed (F) / Provisional (P)	Stage 2	Stage 3	Stage 4	TOTAL
DESIGN FEES					
Architect	F	£60,000		£25,000	£85,000
Principal Designer	F		£7,500		£7,500
Landscape Architects	F		£10,000		£10,000
Structural & Civil engineers	F	£49,950	£29,250		£79,200
Building Services Consultant	F		£14,000		£14,000
Acoustic Consultant including Survey and Testing	F		£7,500		£7,500
Planning Consultant	F	£10,000	£15,000		£25,000
Building Control	F			£16,733	£16,733
Fire engineering consultant	F		£10,000		£10,000
Air tightness testing including desktop review, design review, site advice and visits	F		£5,000		£5,000
Passivhaus	F	£11,970		£11,400	£23,370
NHBC	F			£63,207	£63,207
SAB	P	£6,950			£6,950
SAB Fees	P	£15,000			£15,000
Initial Flood Risk Assessment & Drainage Strategy Report	P	£1,950			£1,950
CCTV Survey of completed Below Ground Drainage System	P	£5,000			£5,000
Topographical Survey	P	£10,000			£10,000
Existing Utility Apparatus Information (Water Main, Sewer Main, Gas Main, Electricity Main, Telecom Main, Cable Tv Main)	P	£5,000			£5,000
Soil Investigation Survey (California Bearing Ratio tests, Percolation Tests, Frost Susceptibility testing & Waste Acceptance Criteria Testing, Compaction Testing, Landfill Gas Analysis, Persistent Organic Pollutants Survey)	P	£30,000			£30,000
Waste Acceptance Criteria Testing soil	P	£5,000			£5,000
Level 1 Ecological Report (includes Desk study and Extended Phase 1 habitat survey)	P	£15,000			£15,000
Arboricultural - Existing Tree Survey & Tree Constraints Plan	P	£3,000			£3,000
Acoustic Survey (Noise Impact Assessment) to support Planning Application	P	£10,000			£10,000
Traffic Impact Assessment (Transport Assessment & Travel Statement)	P	£9,950			£9,950
Planning Condition Discharge Fees	P			£10,000	£10,000
Highways Act 1980 (Relates to classification, maintenance and rights of all parties in public maintained and private streets)	P			£14,950	£14,950
		£248,770	£98,250	£141,290	£488,310
TOTAL					

Project: Oakdale, Caerphilly

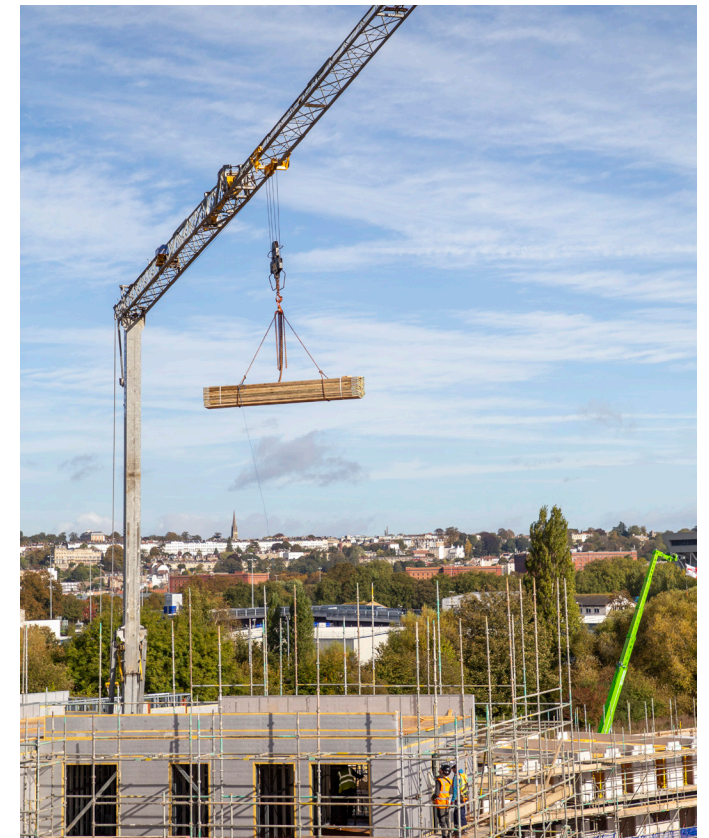
Description: Mixed tenure housing development.

Duration: circa 3 years (including pre-development phase)

A detailed strategy and proposal for the Oakdale development was put forward in the Outline Development Analysis previously issued. This document aims to further clarify the scope for each stage of the project and the Willmott Dixon fees that may be required at each stage, we have also established a schedule of external costs likely to be required to bring the development to fruition and completion.

We are proposing our Development Management model established within our Development Solutions team which adopts the principles and benefits of joint ventures, but avoids the costs and complexity that can be associated with such vehicles.

We bring together the best in construction, residential development and private rental specialism under one roof. Our offering will sit alongside and compliment the traditional Design and Build service provided through the SCAPE framework ensuring that every decision is made to both achieve your aspirations and increase the value and sales rate achieved on the scheme.



Feasibility and Preconstruction

1. Feasibility / Business Plan Development

Purpose: To establish our customers aspirations, potential budget and how the local market might be best utilized to maximize return whilst delivering on pre agreed outcomes through research.

Activity	Difference to Construction Services
Review of scope of service and scheme aspiration requirements with customer to ensure we can drive value.	Specialist knowledge in market data to influence the design and scope.
Market research to establish best uses for the Oakdale site including tenure, mix and house types appropriate for the local market.	Specialist knowledge in market data to influence the design and scope.
Review of site to formulate initial concept ideas with sales values and rates a key driver in design.	Specialist knowledge in market data to influence the design and scope.
Commercial modelling to review viability of different use classes and mixes to maximize customer return against agreed outcomes.	Specialist knowledge in market data to influence the design and scope.
Providing specialist advice on S106, CIL and statutory contributions required for the development.	This will provide advice on costs beyond the design and build element and its usual expertise.
Advising on overall development costs (beyond construction costs), development value, project income, financial modelling, viability tests and solutions.	This will provide advice on costs beyond the design and build element, to cover other development costs not included within the construction costs.
Fee: 8 Days @ £750.00 = £6,000.00-Free of charge	

Appendix 2 Scope of Service



2. Sales and Marketing

Purpose: Undertaking further research around the scope established within feasibility with the purpose of producing and delivering a bespoke sales and marketing strategy aimed at enhancing the return in values and rate of sales for Caerphilly County Borough Council.

Activity	Difference to Construction Services
Produce sales and marketing budget in line with appraisal.	Separate from construction offer.
Development of a robust sales & marketing strategy for the development focused around the local market.	Separate from construction offer.
Undertaking detailed sales and market research to understand demographics and purchaser profiles including likely current and future demand.	Separate from construction offer.
Creation of branding to promote and market developments.	Separate from construction offer.
Marketing collateral and IP rights; this includes marketing protocols, website management and brochures etc.	Separate from construction offer.
Developing bespoke flexible yet cost effective internal specifications that mirror purchaser aspirations to encourage a healthy rate of sales.	Separate from construction offer.
Selection and management of the appointed sales agents.	Separate from construction offer.
Fee: 10 Days @ £750.00 = £7,500.00 – Free of charge	

3. Design & Technical Expertise

Purpose: Each development is bespoke to the local market and the times it is delivered. As such market patterns, statutory requirements and finishing trends need to be balanced to create a product suitable to the area and target demographics. Without this sales values and rates will suffer putting the Council's investment at risk of not achieving the true potential.

Activity	Difference to Construction Services
Creating a detailed design brief for planning architect defining unit mix and sizes that will optimise space and profitability.	This differentiates from the construction offer as this is focussed on creating the right mix from a development income perspective to maximise commercial returns. The construction offer focusses on the technical side of the scheme.
Working with our build team to deliver value engineered solutions that reduce cost without impacting the end value and saleability of the product.	Specialist knowledge in market data to influence the design and scope.
Working with the design team to create detailed internal layouts that maximise demand and sales income yet remain within a pre-defined cost budget.	This differentiates from the construction offer as this is focussed on creating the right internal layout from a development income perspective to maximise commercial returns. The construction offer focusses on the technical side of the scheme.
Ensure the right product mix and aesthetic intent in advising the design team.	This differentiates from the construction offer as this is focussed on creating the right scheme layout from a development income perspective to maximise commercial returns. The construction offer focusses on the technical side of the scheme.
Advising on construction materials, methodology, common part layouts and the interface with commercial and residential uses.	This differentiates from the construction offer as this is focussed on creating the right scheme layout from a development income perspective to maximise commercial returns. The construction offer focusses on the technical side of the scheme.
Fee: 15 Days @ £750.00 = £11,250.00-Free of charge	

Appendix 2 Scope of Service



4. Planning

Purpose: Liaising with the local planning authority and design team to ensure the correct mix, site layout and aesthetics detailed in the design and sales strategy are achieved to ensure sales values are enhanced and a product suitable to the market is achieved and not diluted in the process.

Activity	Difference to Construction Services
Attending planning meetings, monitoring and negotiating with planning officers from pre app through to determination to ensure the sales and development intent is not diluted through the process.	Separate from construction offer.
Calculation, negotiation and administration of CIL obligations and any relief that may be achievable.	Separate from construction offer.
Fee: 12 Days @ £750.00 = £9,000.00 Free of charge	

Construction Phase

5. Delivery of Development and Sales & Marketing – Optional and subject to negotiation

Purpose: With an agreed sales and marketing strategy in place created to achieve your aspirations we will manage the process and deliver on the agreed outcomes ensuring the councils investment achieves the greatest return possible.

Activity	Difference to Construction Services
Implementing and continually reviewing robust sales and marketing strategies for maximum exposure and creating interest.	Separate from construction offer.
Getting the right product delivered on time and managing customers' expectations.	This will advise on elements away from the normal design and build scope.
Delivering the right quality, attention to detail and managing all aspects of the development process to ensure commercial return is achieved.	This will advise on elements away from the normal design and build scope.
Managing all aspects of the development from inception through to completion beyond the design and build delivery.	Separate from construction offer.
Overseeing branding and public relations liaising with the council team as necessary.	Separate from construction offer.
Where appropriate registering with Help to Buy (or equivalent) to support scheme sales.	Separate from construction offer.
Arranging suitable specialists as required, such as mortgage advisors, to support the sales process as appropriate	Separate from construction offer.
Overseeing the design and fitting out of marketing suite and show homes.	Separate from construction offer.
Holding launch events and open days to maximise exposure and return for the development.	Separate from construction offer.
Managing and securing newly constructed properties after handover until sales and lettings.	Separate from construction offer.
Liaising with potential estate management companies	Separate from construction offer.
Production of handover information.	Separate from construction offer as this relates to sales specific home user guides, sales reporting and purchaser confidence.
Managing the sales and completion of the homes including liaising with solicitors through the sales process.	Separate from construction offer.
Fee: TBC	

6. Governance – Optional and subject to negotiation

Purpose: At Willmott Dixon we understand the governance required within Council customers to allow a project to both come to fruition and to progress. As such our governance offering provides you with the initial gateway reports along with real time reporting and feedback to allow councils cabinets and decision makers the confidence in their investment.

Activity	Difference to Construction Services
Creation and management of the business plan.	This will provide advice on elements beyond the design and build element, to cover other development costs not included within the construction costs.
Support in developing cabinet and internal approval papers as required.	Separate from construction offer.
Creating and chairing a project board, and associated sub groups, to ensure suitable governance and management of the project.	Separate from construction offer.
Preparing and circulating the Board papers to the Partnership Board on a monthly basis including minute taking and issuing the minutes.	Separate from construction offer.
Assisting in the preparation and maintenance of the Development Account, the Financial Model, and such other relevant accounts, records, cost reports, and budget estimates.	Separate from construction offer.
Producing and managing the financial modelling of the development.	Separate from construction offer.
Advising on development costs, development value, project income, financial modelling, viability tests and solutions.	Separate from construction offer.
Monitoring of financial model through delivery against project business plan.	Separate from construction offer.
Providing weekly reports detailing sales values and rates achieved and reforecasting the expected GDV against final position.	Separate from construction offer.
Production of final commercial position report.	Separate from construction offer.
Fee: TBC	