

Project Brief

Hook Norton



Project Brief – Affordable Low Carbon Community Housing in Hook Norton

1. Introduction

We seek a creative architect or group of architects who are inspired by the idea of working directly with the community on a unique design challenge.

We warmly invite tender to develop detailed plans for submission for full planning consent for a group of affordable homes that combine environmental sustainability with strong visual appeal, building on the pre-application recently submitted.

This Design Brief has been prepared by Hook Norton Community Land Trust Limited (HNCLT) to procure architectural and other design services that will be required to progress the scheme from the current stage where a pre-application submission has been made (but response yet to be received) to full planning consent. It is a requirement that the Architect and design team produce designs and drawings to meet Passivhaus “Classic” standard. The Architect must be able to offer practical design advice based on their experience gained from working in this market.

The Brief sets out HNCLT’s design preferences and we will work with the successful Architect and team throughout the design stage to optimise the balance between cost and quality, ensuring that the final product provides a good quality, viable development

2. Overview

This Project’s aim is to work with the Hook Norton local community to develop an exemplar site on land which is currently owned by Cherwell District Council to provide ‘affordable and sustainable housing’ for those with a local connection to the village. Hear what some of the community’s thoughts are on this via the video on our home page www.hn-lc.org.uk.

New housing developments in rural villages are normally seen as unwelcome, externally imposed projects driven by national-scale developers. Given developers’ obligation to maximize commercial returns, ‘affordable’ components of these developments are rarely truly affordable or sustainable and design is usually unadventurous. They are also usually aimed at the more profitable end of the wider market and rarely address the specific needs of the communities in which they are built.

Hook Norton Community Land Trust Ltd (HNCLT), a community social enterprise working in partnership with Cherwell District Council (CDC), aims to turn this process on its head through an innovative project. The key innovations being considered are:

- The focus of the housing needs to be met is being drawn up in consultation with the community. HNCLT and Hook Norton Low Carbon Ltd (HNLC) has taken a lead in engaging with the wider community and working with the Hook Norton Parish Council (HNPC). The community feedback to date incorporated in the pre-app submission is for a mix of housing that includes affordable starter homes for local people, and homes for ‘right sizing’ to allow local residents to free up larger family-sized homes.
- The architect must maximise the number of properties developable on the site, taking into account site any relevant site constraints. Careful consideration will need to be given to

achieving the most appropriate site layout and design of the units so as to maximise the financial viability and flexibility of the site whilst ensuring that the design succeeds in creating an attractive place where people choose to live whilst evolving to meet future needs and having minimum impact on the neighbouring properties.

- The aim will be to create homes with design and environmental merit. The specifications will encourage low carbon, sustainable design from the outset. The project will include community renewable energy features and a micro-grid, and these elements will benefit from extensive input from the Low carbon Hub (LCH) and their partners in the Local Energy Oxfordshire (LEO project).
- The development is likely to include provision for low carbon transport options such as shared electric bikes and electric vehicles.
- Community funding options will aim to enhance the strong local links to the project and may include grants, loans and equity. The option of a local share scheme based on adaptation of models which have been successfully used for community renewables projects will form the focus of the fundraising for the development phase of the project.
- HNCLT requires the architect/design team to produce innovative designs in keeping with the locality. The architect should maximise the opportunity to deliver a quality, innovative development with the potential to be an exemplar for sustainable, affordable community-led housing across Cherwell, Oxfordshire and beyond.

Key principles for the development:

- Best practice on energy efficiency and minimise carbon emissions.
- Enhance occupant comfort and productivity.
- Increase occupant engagement with and ownership of the energy consumed by buildings.
- Drive design for long life, low environmental impact, low maintenance, flexibility and end of life recycling.
- Foster community engagement within the development and the wider village.
- Encourage social contact and reduce isolation
- Minimise mains water consumption.
- Provide a net positive impact on biodiversity.
- Promote and support sustainable travel modes.

Key elements from the community survey and discussions with CDC which have driven the pre-app submission have been:

- Complements the surrounding buildings and enhances the local area;
- Incorporates landscaping and a wildlife friendly development as an integral element;
- Preserves and enhances the existing boundary hedgerows/trees;
- Incorporates on-site general green space;
- Explores the possibility of providing allotments or a community green space to meet the ambitions of the local community;
- Provides a mix of housing which includes smaller 1 and 2-bedroom houses for smaller and downsizing households;
- Considers the option for communal “guest bedrooms” and other facilities as part of the overall development;

- Ensures the development meets the 16 Design Criteria for the Lifetime Homes Standard <http://www.lifetimehomes.org.uk/pages/revised-design-criteria.html>
- Provides the opportunity for an element of sheltered/extra care housing for the elderly to be explored.
- Allows for the incorporation of renewable energy features at an individual and community level such as PV, solar thermal, and potentially district heating if it is viewed there is sufficient heat demand, particularly in relation to hot water supply.
- Incorporates sustainable design features to cost-effectively reduce ongoing energy costs.
- Provides vehicular access via the Bourne View (TW) estate;

The concept design and the pre-app work has been completed by Charlie Luxton Design in response to a tender issued for this earlier stage of the work (pre-App attached). Taking the project forward to full planning and then to on-site construction HNCLT wishes to engage an architect who, as the lead designer, owns and has design responsibility for ensuring cost-effective Passivhaus compliance as the design develops. In terms of specific tasks this will include managing and revising the PHPP model (this needs to be iterative rather than just at the end of each RIBA stage). Particular attention will be applied to simplicity and buildability of proposed strategies to deliver the airtightness requirement since this which will be the key risk passed to the contractor for the build phase. http://www.passivhaustrust.org.uk/what_is_passivhaus.php

We will expect the successful architect to evaluate potential for system build options (such as Beattie <http://www.beattiepassive.com/index.php>) to minimise construction costs consistent with promoting quality performance and reducing defects as well as reducing construction emissions and encouraging engagement with local trades.

The ambition is for the project to be net carbon neutral in the construction phase as well as the post build occupancy phase. Therefore, we have a requirement to use low embodied energy materials as a priority. Bidders are asked to provide a strategy for how they will assess the choices they make in the design to minimise emissions during the construction phase and provide prior project experience examples.

3. The site and current status

The proposed site is located behind homes in the cul-de-sac on Bourne Lane, (see attached pre-App). A land survey has been carried out. A wildlife survey was carried out in 2012 and, while this will need to be updated ahead of full planning permission, it indicates that there are unlikely to be wildlife issues for the site.

Discussions took place in 2015/16 with Taylor Wimpey (TW) who were securing planning permission to develop the adjacent site to the north. These discussions allowed for the planning permission to include creating an access from the TW site to the CDC land. There were also feasibility drawings done at this time by the Council to evaluate how many units could be accommodated on the site. It was determined that there was a potential capacity for the site to deliver around 8 units which were anticipated to be small houses.

Originally it was discussed with Taylor Wimpey whether they could provide the CDC land with serviced plots in exchange for the Council allowing the developer to use the site as a compound for their development as well as locating their pump station on the CDC land. However, due to timescales, this was ultimately not feasible. Therefore, although the land now has an access road leading to it from the completed TW site, there are currently no services in place that would enable

development to take place.

In previous discussions TW have expressed a desire to seek commercial remuneration for the 'ransom strip' which they have retained ownership of between the new road and the CDC land. An MoU with HNLC and CDC indicates that this access will now be provided for "a nominal sum" providing the land is developed solely for community benefit. This is in line with community taking a lead role in this project start-up phase with the land ownership being transferred to a local community-benefit organisation, Hook Norton Community Land Trust (HNCLT). This is essential in unlocking community benefit from a site which is currently unused.

The following surveys/reports, where required, have already been obtained by HNCLT for the site and will be available to the successful architect:

- Topographical Survey
- Contaminated Land assessment
- Ecology Survey (to be updated prior to full planning submission)
- Flood Risk Assessment
- Surface water drainage strategy – to be updated when architect has drawn up initial designs/layouts for full planning

Confirmation of title will be supplied by HNCLT.

Except as above, other professional services, surveys or reports which cannot reasonably be foreseen from this brief and the specification document, e.g. site noise, traffic, and similar surveys if deemed required by HNCLT will be arranged by HNCLT and will not form part of the architect's appointment.

4. Programme – Key Stages

The following draft programme is a preferred indication of the timescales that we hope will be achievable in delivering the project. We would be interested to know, in your response to the 'Method of Approach' if you feel that these are realistic, or whether aspects should be revised.

We would, of course, expect to work closely with the architect in refining the programme and ensuring that targets / gateways are met, in order to align the design and construction work with fundraising and securing grants / loans etc.

1. Pre-Application submitted **mid Sept 2019** with a response from CDC planning **by end Oct 2019**
2. Appoint architect **by mid Oct 2019**
3. Submit Full Planning Application **by early January 2020**
4. Achieve planning consent **by early March 2020**
5. Land Transfer from CDC to HNCLT complete **by end March 2020**
6. Technical and Financial Feasibility Report for CESCO prepared by LCH **by end March 2020**.
7. Launch community share offer to raise equity for development phase **by early April 2020**
8. Achieve start on site **by June 2020**.
9. Construction of Community Building, including Community Energy Hub **by end Dec 2020**
10. Communal PVs, batteries and V2G installed and commissioned **by end March 2021**
11. Site completion **by end October 2021**.

5. Design Team Services

a) Overview of Service Required

HNCLT will appoint an architect-led design team ('the design team') to provide design services for the three development sites. This commission covers work from RIBA stage 3 through to RIBA stage 7 (<https://architectureforlondon.com/news/the-riba-plan-of-work/>). The architect will be the lead organisation and their wider team of sub-consultants will be expected to include the following disciplines:

- a. Architect, Lead Designer, Project Lead, and Contract Administrator.
- b. Principal Designer for the purposes of the CDM regulations, undertaking statutory responsibilities for RIBA Stages 3-6.
- c. M&E Engineer.
- d. PHPP Passivhaus designer (preferably carried out by the architect or the M&E engineer, and in any option proposed appointed by the Architect with the Architect holding responsibility for the PHPP model being up to date).
- e. All homes must meet a Passivhaus energy performance specification of 15 kWh/m²/yr for space heating and 120 kWh/m²/yr of primary energy overall including light cooking etc. It is anticipated therefore that the homes will be Passivhaus certified unless there is an over-riding added value to the project of meeting the energy performance standards prescribed but not taking the additional step of certification. The costs of meeting the Passivhaus energy performance levels must be included in the tender price. The costs relating to the process of Passivhaus certification itself (ie. Passivhaus Certifier Consultant and Passivhaus Institute fees) can be shown as a separate optional fee since the priority for the project is meeting Passivhaus energy performance levels rather than the certification process itself.
- f. Structural/Civil Engineer, including below-ground drainage, flood-risk assessment and highway design.
- g. Quantity Surveyor.
- h. Landscape design for public realm areas of the site to adoptable standard.
- i. Any other acoustic, fire, access, Passivhaus PHPP, thermal bridge analysis or other technical advice the team may require to achieve full Building Control design and construction stage approval.

For clarity the following items are excluded from the tender services required:

- j. Planning permission application fees.
- k. Supporting documents for planning which cannot reasonably be foreseen from this brief and the specification document, eg site noise, traffic, ground contamination and similar surveys if required.
- l. Topographic and ecological surveys.
- m. Building Control fees.
- n. NHBC fees.
- o. Site legal fees.

No independent Client Project Manager will be appointed. The architect-led team will act as Architect, Lead Designer, Project Lead, Contract Administrator and Principal Designer with duties as the RIBA guidance and including project management and co-ordination of all aspects of the project, including cost, time and quality, reports to HNCLT, and seeking HNCLT instruction as necessary.

As part of the team the Quantity Surveyor will be expected to control the overall project budget, disbursements etc, and report monthly against budget and expenditure, provide advice on cash-flow and support HNCLT in the management of the budget.

The design team will be required to submit validated applications for planning and building control consent. Formal RIBA Stage 3 & 4 reports will be required from the team, including costs and PHPP results, with presentation, then to be formally approved by HNCLT.

The architect will be responsible for managing, payment and coordination of all sub-consultants within their design team.

The architect/design team are to note and include for the points below.

- a. Whole-life report, see b) below.
- b. Planning application will be submitted at completion of RIBA Stage 3.
- c. Three full colour 3D computer-generation images (CGI renders) will be required at RIBA Stage 3, and “street scene” extended elevations which include surrounding existing houses, trees and buildings for planning application.
- d. Construction partner/contractor procurement is envisaged to be via two-stage traditional tender, with first-stage tender at RIBA stage 3/4A, unless an alternative approach is proposed by the architects defining the value added by the alternative approach proposed.
- e. The architect/team will complete Room data Sheets (RDS) and submit for HNCLT approval.
- f. The HNCLT’s Board are part of the project team, and as part of this project the architect/design team will include them in relevant meetings, allow time to train them to understand the specific site challenges and inspection watchpoints for Passivhaus construction.
- g. RIBA Stage 6 services (handover) services are to include a half-day workshop session with the HNCLT Board and residents, in accordance with “soft landings” best practice, to explain the principles and advantages of Passivhaus, and optimal operation of the homes, and include papers and/or web links to comprehensive user-friendly engagement, operating and troubleshooting information.
- h. RIBA stage 7 services as c) below.

b) Whole-life report.

The team will produce a whole-life carbon and cost sustainability report at RIBA stage 3, to be reviewed/updated at RIBA stages 4 and 7. This is to compare 60-year predictions for capital and running costs and carbon emissions for three option scenarios:

- (i) a notional existing Victorian solid-wall single-glazed 2-bed 4-person house;
- (ii) an agreed notional 2017 Building Regulations 2-bed 4-person house;
- (iii) an agreed typical 2-bed 4-person house as proposed this project.

The purpose of this study is to demonstrate the superior performance of Passivhaus construction, whole-life cash savings, paybacks, carbon savings, and its forward-thinking innovative energy-efficiency and cost-effectiveness to address issues of deprivation, running costs, fuel poverty etc.

c) RIBA stage 7 (post-completion) services

- (i) Collection and analysis of meter readings at monthly intervals for 12 months, and 2 half-day workshop sessions with the HNCLT and residents, to develop and reinforce Stage 6 handover, to develop and reiterate any seasonal issues, and to assist with resolving any occupancy/operational issues.

- (ii) Post-occupancy evaluation such as BRE best practice, BUS or similar to be agreed with HNCLT (<https://www.bre.co.uk/page.jsp?id=1793>, <https://busmethodology.org.uk/>) carried out after 12 months occupancy with input from all disciplines and a written report, including energy use.
- (iii) Collection and analysis of meter readings at monthly intervals for months 12-24 of occupation, and one half-day workshop session with the HNCLT and residents, to review lessons learnt.
- (iv) Thermal imaging, one visit and photo report with narrative and recommendations bearing in mind the November to March window for effective thermal imaging studies.

d) Project Budget

The anticipated project budget is circa £2 to 3.5 million including all professional fees. For tender purposes, the design team should assume 15 units in line with the pre-app submission (attached). For the avoidance of doubt the extensive consultation with potential residents and the HNLC Board planned during RIBA phase 3 means there is the potential for complete re-working of the concept designs developed for the pre-app submission.

Our preference is for an overall tender price including day rates and an overall limit of liability. Other pricing models may be considered but should be discussed with HNCLT prior to submission of the tender.

e) Approach to community engagement

Engaging with HNLC and the 45+ members of the community who have already expressed an interest in potentially living in one of the community homes is a key part of the brief. What approach will you use to engage with the group and incorporate their ideas in developing the project to the next stage from the pre-app submission and input into the final design while not losing sight of the overall project aims?

Creativity is a key component of our selection criteria. Whilst we understand that it is not appropriate to seek any great level of detail, we would like to see something that conveys your creative vision for the site (eg. Moodboard/Creative concepts/Vision/Sketches) if you see a major deviation is appropriate from the concept designs submitted as part of the pre-app.

What form this takes is up to you and the creative content will remain your IP.

6. References

Please provide contact details for two references that you have worked for on similar projects within the past three years and that the project team may contact prior to confirmation of any appointment.

TENDER RETURN INSTRUCTIONS

Please send your tender response via email, as .pdf files, in time for the deadline below to Tim.lunel@Lowcarbonhub.org.

Where tenderers wish to visit the site they should contact Tim.Lunel@lowcarbonhub.org and Catherine.Ryan@lowcarbonhub.org before 25th September 2019 to arrange for a mutually convenient date.

Attendance or absence of a site meeting will not form any part of the tender review process.

Hook Norton Community Land Trust will complete assessment of the tenders by 14th October 2019 and if we have any questions we will contact you before that date.

We hope to confirm appointment on 15th October 2019 at a face-to-face meeting in Hook Norton, so we ask tenderers to keep this date free in their diaries.

If an initial review of the tenders on 11th October indicates that a face-to-face meeting will be required to clarify the bids from a shortlist of 2-3 tenderers tenders then the 15th October will become a tender presentation meeting in Hook Norton or Oxford with a final decision by the 17th October 2019.

DATE FOR TENDER RETURN: Thursday 10th October 2019 1pm

PLEASE EMAIL YOUR TENDER RESPONSE TO: Tim.Lunel@lowcarbonhub.org

DATE OF TENDER ISSUE: Tuesday 17th September 2019

If you have further questions which you are happy to be shared as clarifications with other tenderers, please contact:

Tim.Lunel@lowcarbonhub.org

or call 07908 754141

Thank you for your interest and we look forward to hearing from you.

