

CLIENT BRIEF – NEW CARRINGTON MASTERPLAN: DELIVERY STRATEGY

1. Purpose

- 1.1. Trafford Council is looking to appoint a suitably qualified and experienced consultancy / consultancies to produce a comprehensive Delivery Strategy for the proposed New Carrington allocation.
- 1.2. The Delivery Strategy is the first part of a detailed Masterplan for the proposed New Carrington allocation as required by Policy JPA33 of the Places for Everyone (PfE) Plan.
- 1.3. The New Carrington Masterplan will provide a clear planning framework to enable the sustainable, phased delivery of the New Carrington allocation and its associated infrastructure, enabling high quality place making through the provision of clear and unambiguous planning and delivery guidance. This brief relates to the 'Delivery Strategy' element of the Masterplan.
- 1.4. The New Carrington Masterplan: Delivery Strategy must consider the aims and requirements of the whole allocation to facilitate the coordinated delivery of development alongside all types of infrastructure, to enable place making across the site as well as ensuring integration with existing communities and environments.
- 1.5. The key outputs of the Delivery Strategy will be an Infrastructure Framework, including areas of land being 'safeguarded' from development for the purpose of infrastructure delivery, a robust and effective charging mechanism for proportionate contributions along with a viability and affordable housing sensitivity assessment. This will provide a basis for the sustainable delivery of the site, providing certainty and clarity for local residents, developers, statutory consultees, Trafford Council and other stakeholders.
- 1.6. This brief covers the required tasks along with the supporting background information.

2. EXCLUSION FROM TENDER PROCESS

- 2.1. Please note that we will not accept tenders from any consultant team(s) for any of the lots within this commission if they have acted on behalf of a promoter or objector on any aspect of the proposed allocation of New Carrington under policy JPA 33 of the Places for Everyone plan as part of, or since the Regulation 19 version of the plan was published August 2021.

3. Trafford Planning Policy Context

- 3.1. Places for Everyone (PfE) is a joint Development Plan Document being produced by nine Greater Manchester districts (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford, and Wigan). It identifies the quantum of new housing and employment development, supports the delivery of key infrastructure, and protects environmental assets.
- 3.2. The Plan was submitted to the Secretary of State for Levelling Up, Housing and Communities in February 2022, and its Examination in Public commenced on 02 November 2022. Hearings sessions concluded on 05 July 2023 and the Inspectors issued IN39 on 11 September 2023 advising that they are satisfied at this stage of the examination that all the proposed main modifications are necessary to make the Plan sound and/or legally compliant and would be effective in that regard. Consultation on the Main Modifications will conclude on 06 December 2023.
- 3.3. Consequently, the Plan is at a significantly advanced stage in the plan making process, and as such can be afforded substantial weight in the determination of planning applications.
- 3.4. Notwithstanding the above, the Development Plan for Trafford currently consists of:
 - Core Strategy (adopted January 2012)
 - Saved policies of the Unitary Development Plan (adopted June 2006)

- Greater Manchester Joint Waste and Minerals plans (adopted April 2012 and April 2013 respectively)
- Altrincham Town Centre Neighbourhood Business Plan (formally “made” by the Council in November 2017); and
- Civic Quarter Area Action Plan (adopted January 2023)

3.5. Trafford Council is in the process of preparing a new Local Plan which will replace the Core Strategy and saved policies of the Unitary Development Plan, this will be a translation of the Places for Everyone (PfE) strategic policies at a local level along with a Trafford specific local planning policy framework. The Local Plan will set out planning policy for Trafford to deliver the requirements of PfE and to guide and manage future growth and development needs.

4. New Carrington Masterplan

4.1. The proposed New Carrington allocation will deliver approximately 5,000 homes in total, around 4,300 of which will be within the PfE plan period up to 2039, and approximately 350,000 sqm (in total) of employment floorspace for industry and warehousing development (B2 and B8 respectively).

4.2. In its totality, the New Carrington allocation will create a new sustainable community linking to the existing Carrington, Partington and Sale West areas and communities. Fundamentally, it will provide improved transport, social and green infrastructure to benefit both new and existing communities and increased accessibility to jobs, services, and facilities in the immediate and surrounding areas as well Manchester City Centre. Delivery of the allocation will create a distinct, attractive place which capitalises on the industrial history and prominent landscape features on the site and surrounding areas.

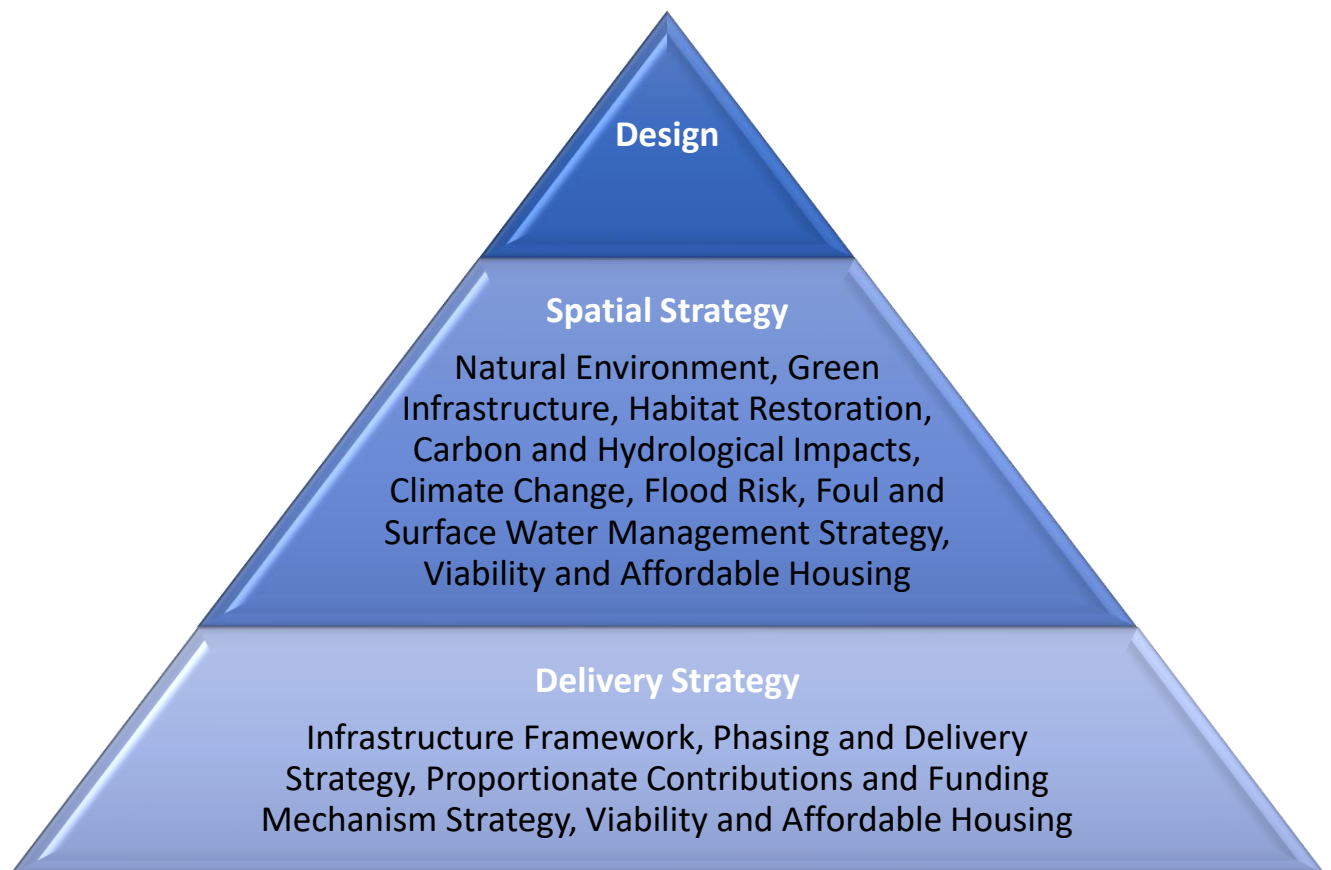
4.3. A high-level Masterplan was prepared for the New Carrington allocation in September 2020, and this informed the Regulation 19 (Publication) version of PfE and subsequent amendments. The September 2020 Masterplan assessed the existing site constraints and determined the overall residential and employment quantum, the likely transport interventions, as well as identifying green infrastructure areas and opportunities. It identified several distinctive character areas within the allocation and included a high level, indicative phasing plan to show how the site could be developed. Overall, the September 2020 Masterplan, alongside other relevant PfE evidence base documents, should be used as the starting point and form a significant evidence base for the Delivery Strategy building on some of the key issues and principles explored, taking account of outputs and requirements of PfE Policy JP Allocation 33.

4.4. PfE Policy JP Allocation 33: New Carrington, Criterion 1, requires development of the site to be in accordance with a Masterplan. The policy wording is as follows:

“Be in accordance with a masterplan that has been developed in consultation with the local community and approved by the Local Planning Authority. The masterplan must include a phasing and delivery strategy, as required by policy JP-D1. Central to the masterplan shall be the consideration of opportunities to restore habitats, strengthen ecological networks, and manage the carbon and hydrological implications of development. It should also have regard to the anticipated Hynet North West Hydrogen pipeline (as relevant). The masterplan will be prepared in partnership with key stakeholders to ensure the whole allocation site is planned and delivered in a coordinated and comprehensive manner with proportionate contributions to fund necessary infrastructure”.

- 4.5. For expediency, a staggered approach will be taken to the preparation of the New Carrington Masterplan, reflecting the scale of the allocation and the matters which need to be considered. The phased approach to the New Carrington Masterplan is set out in Figure 1 below. The first part is the 'Delivery Strategy'. This approach allows for the various elements to be 'layered' on top of one another, which taken together will comprise the Masterplan.
- 4.6. Once all stages are complete, the Masterplan will be adopted as a single planning document i.e., Supplementary Planning Document or Supplementary Plan.

Figure 1: Indicative Phased Approach to New Carrington Masterplan



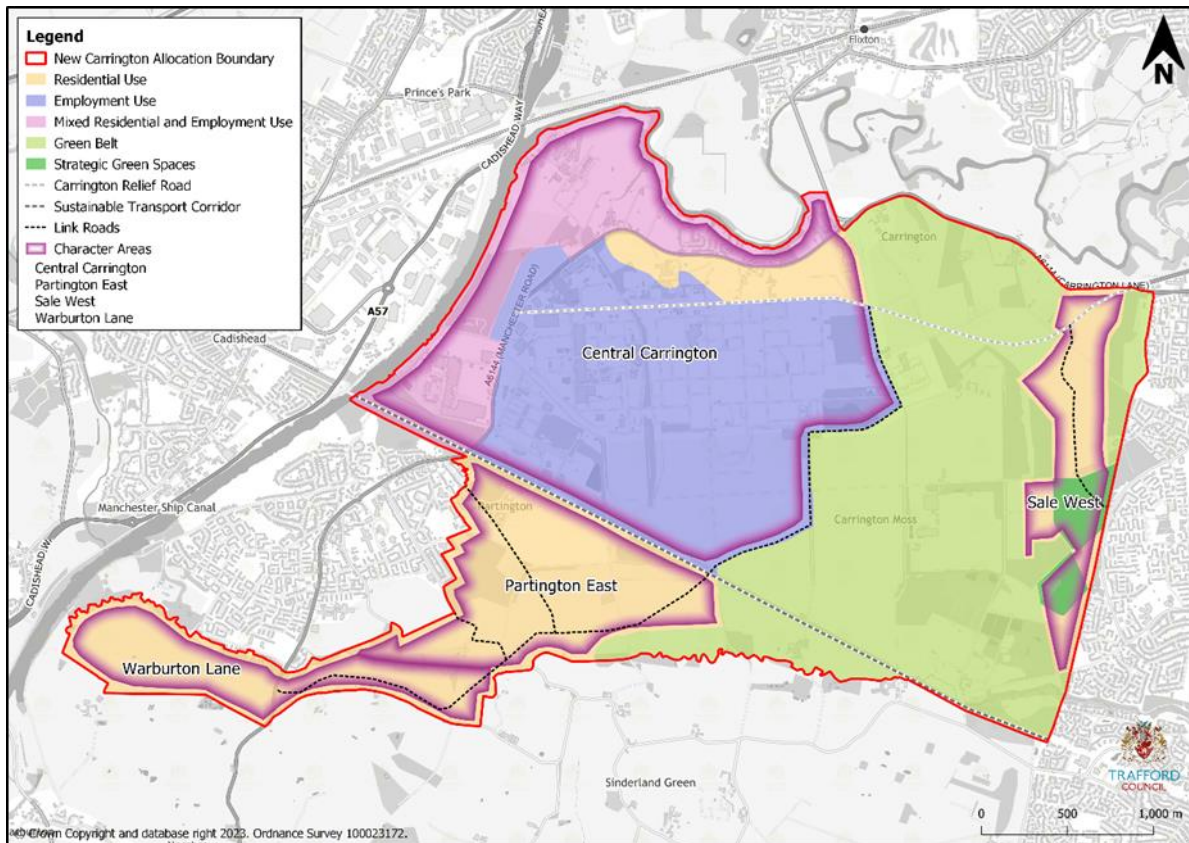
- 4.7. It is critical that the components of the Masterplan provide an appropriate level of detail to ensure the Council's ambitions for New Carrington are fully realised and the many benefits of the site maximised. All elements must therefore be sufficiently robust to withstand scrutiny and challenge either at planning appeal or in the courts, as the Masterplan will be used to determine planning applications and attract funding from appropriate sources.
- 4.8. The successful delivery of the site will require a coordinated approach between all landowners, developers, and infrastructure providers. Trafford Council is therefore committed to working with stakeholders, including local communities, to bring forward a detailed Masterplan with a phasing and delivery strategy that provides a rational and robust framework for the sustainable delivery of the New Carrington allocation.

New Carrington Masterplan Area

- 4.9. The New Carrington Masterplan will need to cover the whole of the allocation – see Figure 2. The allocation is split into four indicative development Character Areas: Central Carrington, Partington East, Sale West and Warburton Lane. The allocation includes areas identified for residential use, employment use and mixed residential and employment use. The allocation also includes a

significant area of retained Green Belt through the middle of the site, Strategic Green Spaces, and strategic transport improvements.

Figure 2: New Carrington Indicative Allocation Plan (Picture 11.48 in PfE)



5. **New Carrington Masterplan: Delivery Strategy**

5.1. The ‘Delivery Strategy’ element of the New Carrington Masterplan relates to the following requirements of PfE Policy JPA33 Criterion 1:

- a) “Be in accordance with a masterplan that has been developed in consultation with the local community and approved by the Local Planning Authority.
- b) The masterplan must include a phasing and delivery strategy, as required by policy JP-D1
- c) It should also have regard to the anticipated Hynet North West Hydrogen pipeline (as relevant).
- d) The masterplan will be prepared in partnership with key stakeholders to ensure the whole allocation site is planned and delivered in a coordinated and comprehensive manner with proportionate contributions to fund necessary infrastructure.”

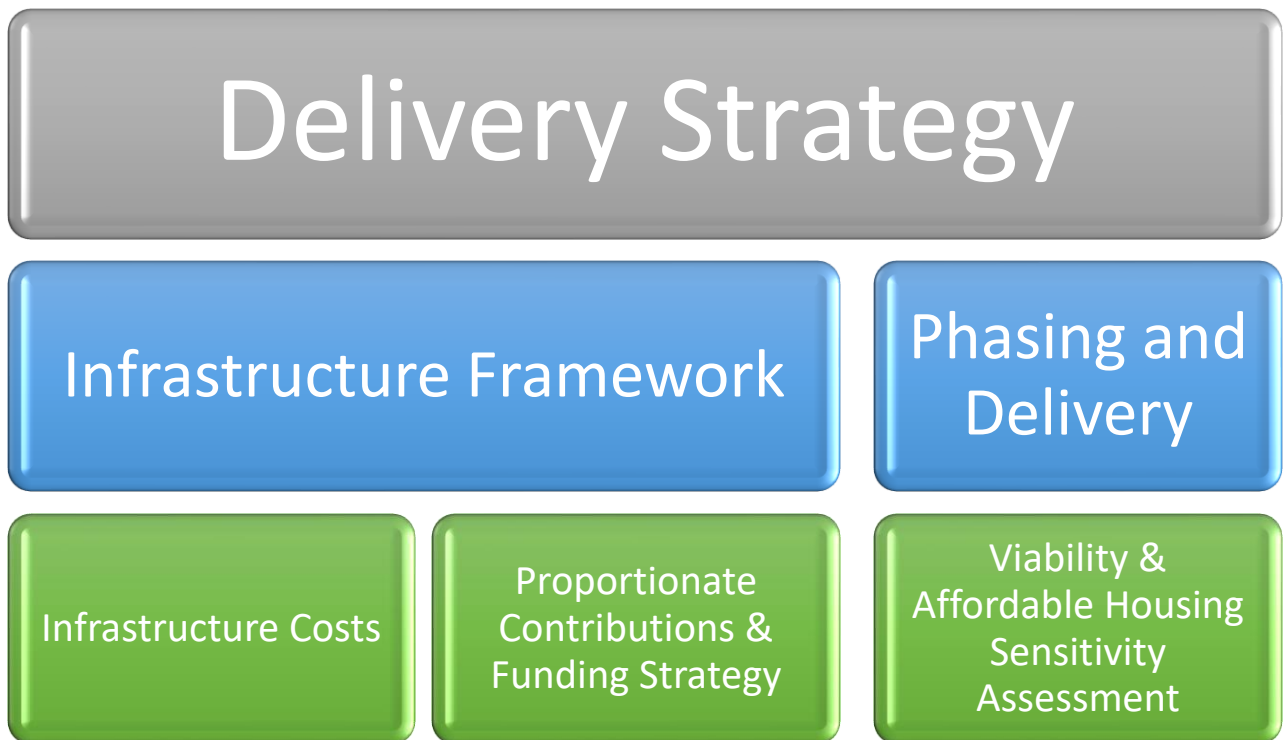
5.2. The Masterplan’s ‘Delivery Strategy’ will comprise the following components:

- Infrastructure Framework and Phasing and Delivery Programme (see section 5)
- Infrastructure Costs (see Section 6)

- Proportionate Contributions and Funding Mechanism Strategy (see Section 7)
 - Viability and Affordable Housing Sensitivity Assessment (see section 8)
- 5.3. The structure of the Delivery Strategy and this brief means that bids are invited on the strategy as a whole, as well as specific / multiple elements of it. Bidders will need to make it clear which elements of the Delivery Strategy they are bidding for, how they would have regard to the other elements and confirm that they would be content to be appointed for only one element(s) of the commission even if bidding for the whole.
- 5.4. There are a number of known constraints on/within the site as set out in the New Carrington September 2020 Masterplan which must be considered and used to inform the Delivery Strategy.

Objectives and requirements of the Delivery Strategy

- 5.5. The purpose of this Brief is to facilitate the production of a comprehensive Delivery Strategy for the proposed New Carrington allocation. The Delivery Strategy is made up of the following elements, the detailed requirements of each element are set out in the following sections of this Brief.
- 5.6. Figure 3: Elements of the Delivery Strategy



Infrastructure Framework and Phasing and Delivery Programme (Section 5)

- 5.7. This will be the ‘lead’ commission and will be responsible for drawing the various elements together into a final ‘Delivery Strategy’ document.
- 5.8. The Infrastructure Framework will need to identify the key infrastructure requirements and their location within the masterplan area. It will then need to include a Phasing and Delivery programme, identifying trigger points for infrastructure delivery.
- 5.9. This element of the Delivery Strategy will also lead on all engagement and consultation requirements.

Infrastructure Costs (Section 6)

- 5.10. Infrastructure Costs will be required for the interventions identified in the Infrastructure Framework. Amey LG Ltd via the One Trafford Partnership will undertake this element of the Delivery Strategy for all civils infrastructure (e.g., roads, cycle routes and paths etc.) and therefore bids are not invited on this. It has been included in this Brief for completeness and to provide an understanding of the overall Delivery Strategy.
- 5.11. Costings for buildings and other types of required infrastructure (schools, combined heat and power network, local centres etc.) however will need to be provided and a supplier is sought for this element of the Delivery Strategy.

Proportionate Contributions and Funding Mechanism Strategy (Section 7)

- 5.12. The Delivery Strategy will need to identify a proportionate infrastructure contribution for the residential and employment development within the allocation area. This will be based on the Infrastructure Framework and Costs elements.
- 5.13. A suitable funding mechanism strategy is also required.

Viability and Affordable Housing Sensitivity Assessment (Section 8)

- 5.14. Places for Everyone Policy JPA 33: New Carrington requires development within the allocation to *"make provision for a minimum of 15% affordable housing across the allocation to be provided in accordance with local policy requirements"*.
- 5.15. This level of provision has been subject to viability assessment as part of the preparation of Places for Everyone and has been subject to examination by an independent panel of three appointed inspectors. The frontloading of viability into the plan making process stipulated by national policy and guidance, therefore makes the minimum requirement of 15% affordable housing provision the starting point for the masterplan and all future planning applications.
- 5.16. A sensitivity assessment of the detailed requirements of the allocation is therefore necessary to ensure that the minimum 15% affordable housing provision remains achievable across the site.

6. Infrastructure Framework and Phasing and Delivery Programme

- 6.1. The Infrastructure Framework and Phasing and Delivery Programme is the 'lead' element of the Delivery Strategy, and it will therefore have oversight of the other elements. This will enable an iterative process in the preparation of the Delivery Strategy, which will be essential in considering the interdependencies of the various elements.
- 6.2. As the 'lead' element of the Delivery Strategy, the consultant appointed to complete this element will be required to prepare a final Delivery Strategy document, drawing together the various components. It is anticipated that this will be a relatively short, easy to read document that can be used by the Council, landowners, developers, local communities, statutory consultees, and infrastructure providers to understand what infrastructure provisions and contributions are required and the interdependencies between development phasing and infrastructure delivery.
- 6.3. Notwithstanding the above overarching requirements, the Infrastructure Framework and Phasing and Delivery Programme must undertake the following critical tasks:
- Task 1: Review and utilise the existing baseline / masterplan work for New Carrington and identify the infrastructure required to support the development
 - Task 2: Identify and select appropriate infrastructure schemes
 - Task 3: Develop preliminary designs for key infrastructure schemes

- Task 4: Prepare a Phasing and Delivery Programme
 - Task 5: Produce the Final Delivery Strategy Document
- 6.4. All parts of this element of the Delivery Strategy that can be 'mapped' must be done so on GIS and provided to the Council.

Task 1: Review and utilise the existing baseline / masterplan work for New Carrington and identify the infrastructure required to support the development

- 6.5. This will include a review of baseline constraints, ground investigation data and existing planning permissions within the Masterplan area. A review of the PfE thematic policies and relevant PfE Evidence Base documents and Topic Papers must be undertaken. PfE Policy JPA33 relates specifically to New Carrington, as well as the relevant sections of Appendix D which lists all the necessary transport infrastructure required to deliver the allocation. A review should also be undertaken of relevant national, Greater Manchester and Trafford policy documents (including the Transport for Greater Manchester Transport Strategy 2040 and associated documents). This task will help to inform and develop the constraints, routes/ locations and land available for the infrastructure.
- 6.6. To further support this work, five half-day workshops will be required to engage with key stakeholders and gather their views on where they believe new infrastructure should be located / routed, what its purpose should be and what it should comprise/ its specification and its corresponding scale. The workshops will need to be with the following groups:
- Trafford Council Officers
 - Elected Trafford Council Members and Parish Councils
 - Community and Local Residents
 - Landowners and/or Developers
 - Relevant Statutory and Non-Statutory Consultees
- 6.7. Where possible, these will take place on consecutive days for ease, expediency, efficiency, transparency, and fairness. In person workshops should be planned and costed for in the first instance. Community and local resident workshops will take place in/around the proposed allocation site. Officers from Trafford Council will attend each of these workshops.
- 6.8. Required outputs from Task 1:
- a) Report setting out the baseline geophysical, policy and evidence base position. This must include maps showing the site constraints and relevant spatial information plotted on GIS.
 - b) List of the Infrastructure Requirements for the allocation – informed by the review of existing policy requirements and evidence. This should include onsite, as well as offsite mitigation requirements both within the areas local to the allocation and more generally.
 - c) Summary of the process and outcomes of engagement workshops, including a review of the comments / suggestions and an explanation setting out how comments/suggested have been taken forward / ruled out in an easy-to-read summary report, providing transparency to the process.

Task 2: Identify and select appropriate infrastructure schemes

- 6.9. Taking into consideration the constraints identified and views expressed in Task 1, develop a set of potential options for the design and location of necessary and supporting infrastructure which meets the requirements of JPA33 in full.
- 6.10. The Infrastructure Framework must identify (in collaboration with the Local highway Authority and Transport for Greater Manchester (TfGM)) critical internal transport routes, infrastructure locations / interventions and public transport services, using Appendix D of PfE as the starting point, ensuring the following as a minimum are covered, in relation to transport:
- a) Active travel corridors / routes, including new routes as well as improvements to active travel infrastructure on existing routes / highways. This should also include routes outside the allocation boundary which link to existing communities / key destinations or active travel schemes.
 - b) Public transport services and routes, including an assessment of existing bus services and identification of how these could be amended to serve the development parcels, as well as consideration of service frequency and potential new routes. Regard should also be had to enhancing links to public transport hubs outside of the allocation area.
 - c) Highways requirements – a road hierarchy should be established, including the Carrington Relief Road and identifying internal access routes to development parcels.
- 6.11. All of the options should facilitate movement by sustainable transport modes and achieve appropriate 'right mix' targets set out in the Transport for Greater Manchester 20240 Strategy. Consideration should be given to how the development parcels will link to existing communities and key destinations, such as existing local/neighbourhood centres, community facilities and key employment sites, in the wider area. Sustainable transport modes must be a priority and therefore the ability for multi-modal hubs/ mobility hubs to be created should be a key factor in achieving the above.
- 6.12. In developing a transport infrastructure framework regard should be had to the PfE thematic policies on transport, as well as the GM Transport Strategy 2040 and associated strategies/ plans. A high-level Transport Strategy for the New Carrington site has also been developed which provides baseline principles for the transport infrastructure interventions.
- 6.13. In addition, the Infrastructure Framework must also identify other infrastructure requirements, ensuring the following as a minimum are covered:
- a) Location(s) of the new local centre in the Partington East character area including suggestions as to the services and facilities which could be located within the Local Centre, having particular regard to the social infrastructure required to support the development, as well as benefits of co-locating services in creating sustainable communities.
 - b) Location(s) of new neighbourhood centres in Central Carrington and Sale West character areas including suggestions as to the service and facilities which could be located within the Neighbourhood Centres, having particular regard to the social infrastructure required to support the development, as well as benefits of co-locating services in creating sustainable communities.
 - c) Locations(s) for a new/extended primary school in accordance with PfE Policy JPA33: New Carrington and JP-P5: Education, Skills and Knowledge
 - d) Location(s) for new health facilities in accordance with PfE Policy JP-P6: Health
 - e) Combined heat and power network

- 6.14. All options explored and/or taken forward together with relevant spatial information must be mapped and plotted using GIS.
- 6.15. All options, including those not taken forward from Task 1 will be required to undergo a period of public consultation of not less than 3 weeks. The consultation will be hosted by Trafford Council via its online consultation portal and copies of the representations provided to the successful consultant within 1 week of the closing date.
- 6.16. All options, including those not taken forward from Task 1 are to be presented to the community at two in person consultation drop-in events to be held in the area(s) local to the proposed allocation. These should include an afternoon/evening session and a weekend drop-in event. Officers from Trafford Council will attend each of these events.
- 6.17. Required outputs from Task 2:
 - a) Report on the options considered for key transport infrastructure routes and an explanation of the evaluation process and key considerations.
 - b) Final Transport Infrastructure Framework Plan
 - c) Report on the options for 'other' infrastructure requirements and an explanation of the evaluation process and key considerations
 - d) Final 'other' Infrastructure Requirements Plan
 - e) Summary of the engagement events, including a review of the comments / suggestions and an explanation setting out which options are being taken forward / ruled out in an easy-to-read summary report, providing transparency to the process.

Task 3: Develop preliminary designs for key infrastructure schemes

- 6.18. Arising from the outputs of Task 2 together with appropriate technical evidence and regulatory requirements, produce RIBA Stage 3/ Project Control Framework Preliminary Designs in collaboration with the Local Highway Authority (where appropriate) for:
 - a) Primary active travel corridors and routes through, within and across the site
 - b) Internal access roads to development areas
 - c) Public transport routes
 - d) Detailed location and indicative scale and composition of the new local centre in the Partington East character area
 - e) Detailed location and indicative scale and composition of the new neighbourhood centres in Central Carrington and Sale West character areas
 - f) Detailed location and indicative scale of a new / extended primary school/s; and
 - g) Any other infrastructure identified.
- 6.19. The output of this stage must also take account of the detailed location, routing, and specification of the Carrington Relief Road, which is a separate piece of work being produced by Amey LG Ltd on behalf of Trafford Council.
- 6.20. Designs must also have regard to the TfGM Streets for All Design Guide and the Trafford Design Code.
- 6.21. This stage should also consider infrastructure phasing and the lead in times to deliver the required infrastructure scheme.

- 6.22. All outputs of this stage together with relevant spatial information must be mapped and plotted on GIS.
- 6.23. Required outputs from Task 3:
- a) Preliminary designs¹ (RIBA Stage 3) for the identified infrastructure schemes (typologies may be appropriate in some instances), which can inform the infrastructure costs.
 - b) Identification of areas of land to be 'safeguarded' for strategic infrastructure routes / requirements.
 - c) Lead in times and build out periods for infrastructure schemes, including regulatory compliance and process.

Task 4: Prepare a Phasing and Delivery Programme

- 6.24. Development of the New Carrington site will need to be phased alongside the necessary infrastructure to ensure a successful, sustainable new community. A high level, indicative phasing plan was developed as part of the September 2020 New Carrington Masterplan, this reflected the distinctive character areas and demonstrated the deliverability of the site. It assumed that multiple residential sites would be delivered alongside each other throughout the plan period in order to maximise the delivery rate and cater for the distinct market areas.
- 6.25. A detailed Development and Infrastructure Phasing and Delivery Programme is now required, guided by the existing development phasing plan from the 2020 Masterplan and the Infrastructure Framework. It is likely that several options will need to be considered to identify the optimal plan taking into account inputs from other tasks within the Delivery Strategy.
- 6.26. The Phasing and Delivery Programme will need to identify 'trigger points' for infrastructure delivery to ensure the sustainable build out of the allocation.
- 6.27. Required outputs from Task 4:
- a) Table detailing the following in relation to the Infrastructure Requirements:
 - b) Infrastructure requirement
 - c) Trigger / Delivery Sequence
 - d) Lead Delivery Agency
 - e) Estimated cost / mechanism
 - f) Monitor outputs from other elements of the Delivery Strategy which may influence the Phasing and Delivery Strategy and make any necessary changes as part of an ongoing iterative process in preparing the Delivery Strategy.

Task 5: Produce the final Delivery Strategy document

- 6.28. Once all other elements of the Delivery Strategy have been completed, a final document will be required. This will need to outline the Infrastructure Framework for the site, the Phasing and Delivery Programme and Proportionate Contributions. Trafford Council will use the document to determine planning applications and will need to be in an accessible format.
- 6.29. It is anticipated that this will be a short and simple document that can be used by the Council, landowners, developers, local communities, statutory consultees and infrastructure providers to understand what infrastructure provisions and contributions are required and the interdependencies between development phasing and infrastructure delivery.

¹ Designs for transport related schemes/ typologies must be formally approved in writing by the Local Highway Authority

- 6.30. The final Delivery Strategy will be subject to formal public consultation for a 6-week period and will be published on the Trafford Council website. Consideration should be given to what other consultation / engagement activities are required to support this.

7. Infrastructure Costs

Civils Infrastructure

- 7.1. Amey LG Ltd via the One Trafford Partnership will undertake this element of the Delivery Strategy for all civils infrastructure (e.g., roads, cycle routes and paths etc.) and therefore bids are not invited on this. It has been included in this Brief for completeness and to provide an understanding of the overall Delivery Strategy.
- 7.2. The outputs of this component will follow the same methodology outlined for Buildings and Social Infrastructure below and will be available to incorporate into Section 7: Proportionate Contributions and Funding Mechanism Strategy.

Buildings and Social Infrastructure

- 7.3. Costings for buildings and other types of required infrastructure such as schools, medical facilities, community facilities, combined heat and power network(s), local centres containing retail and/or commercial uses, parks and playgrounds etc. will also be required for each infrastructure scheme/typology identified in the Infrastructure Framework.
- 7.4. The cost estimations will need to consider specific site considerations which may have an impact on infrastructure costs, for example particular ground conditions which could result in higher overall costs in some areas of the site.
- 7.5. Information on the cost assumptions and appropriate indexation should be set out in the report.
- 7.6. The output of this will be an infrastructure costs schedule which will form the basis for the Proportionate Contributions and Mechanism Strategy.
- 7.7. All parts of this element of the Delivery Strategy that can be 'mapped' must be done so on GIS and provided to the Council.
- 7.8. Required Outputs:
- a) Schedule of costs for each infrastructure requirement
 - b) Explanation of the cost assumptions and how site-specific considerations have been taken into account.
- 7.9. All parts of this element of the Delivery Strategy that can be 'mapped' must be done so on GIS and provided to the Council.

8. Proportionate Contributions and Funding Mechanism Strategy

- 8.1. To ensure the New Carrington allocation is delivered in a sustainable way, alongside the required infrastructure, developments are required to make proportionate contributions to infrastructure.
- 8.2. The Proportionate Contributions and Funding Mechanism Strategy must include key information on the following:
- Task 1: Calculate an appropriate proportionate infrastructure contribution
 - Task 2: Management of Infrastructure Funds
 - Task 3: Funding Mechanism Strategy

- 8.3. All parts of this element of the Delivery Strategy that can be 'mapped' must be done so on GIS and provided to the Council.

Task 1: Calculate an appropriate proportionate infrastructure contribution

- 8.4. Based on the overall quantum of development set out in Policy JPA33 and the requirements identified in the Infrastructure Framework / Costs Schedule, identify an appropriate contribution for residential and employment development. It is anticipated that this will be via an equalisation strategy, or other similar method.
- 8.5. It is also anticipated that the developer contribution will be a flat charge across the whole allocation, but options for variable contributions could also be assessed, if considered appropriate. There may also be opportunities for some of the infrastructure to be delivered 'in kind' as part of the detailed planning and/or delivery phases, this should be considered also, having regard to the phasing and delivery strategy.
- 8.6. In determining an appropriate proportionate contribution, regard should also be had to the Trafford Community Infrastructure Levy (CIL) which will apply to the site.
- 8.7. This task will also need to link to the Phasing and Delivery Strategy for the site as part of the ongoing iterative process in the preparation of the Delivery Plan.
- 8.8. A consultation workshop will be required with the developer / landowners on the New Carrington site. This should set out the process for determining the proportionate contribution. A summary of the comments from the event is required and, where appropriate a response to the issues raised.
- 8.9. Required outputs from Task 1:
- a) Report outlining the methodology used to determine the infrastructure contribution.
 - b) The proportionate infrastructure contribution charge/ charging schedule which will be included in the Delivery Strategy.
 - c) Summary report of the workshop with landowners / developers and, where appropriate, a response to the issues raised.
 - d) Provide input into the overall Delivery and Phasing Programme for the New Carrington site.
 - e) Identify the relevant triggers for payment to facilitate timely delivery of infrastructure.
 - f) Advise on the most appropriate method and level of indexation to be applied to the proportionate contribution.

Task 2: Collection and Management of Infrastructure Funds

- 8.10. Having established the proportionate contribution, advice is sought on collection and management options for the central funding pot across the various build out phases of the New Carrington allocation. This relates to both on-site and off-site infrastructure requirements.
- 8.11. Many items of infrastructure will take several years to complete and some not until the end of the plan period. The Council must be able to hold the proportionate contributions for an indefinite length of time to be able to secure the delivery/ provision of infrastructure, without risk of clawback in future years.
- 8.12. Required Outputs from Task 2:
- a) Report setting out options for the collection and management of proportionate contributions.
 - b) Options and mechanisms for ensuring retention of collected funds secure via the proportionate contributions.

Task 3: Funding Mechanism Strategy

- 8.13. With reference to and informing the Delivery and Phasing Programme, set out:
- a) How the proportionate contributions should be prioritised to fund the timely delivery of required infrastructure, without risking the ability to deliver all the necessary infrastructure.
 - b) What (if any) split/ apportionment should be applied to the contributions between specific schemes or types of infrastructure.
- 8.14. Identify opportunities for external funding and make recommendations to the Council about potential funding streams and strategies.
- 8.15. Required Outputs from Task 3:
- a) Report setting out the optimum prioritisation of funding allocation/ expenditure.
 - b) Optimum apportionment of proportionate contributions to enable the maximum amount of development to be delivered and/or unlocked.
 - c) Identification of external funding opportunities to bridge funding gaps and/or fully fund appropriate infrastructure.
 - d) Identification and proposals for the Councils funding strategy to support and facilitate the full funding of infrastructure at New Carrington

9. Viability and Affordable Housing Sensitivity Assessment

- 9.1. To ensure the delivery of New Carrington remains viable and can achieve the required minimum of 15% affordable housing provision across the site, a sensitivity assessment should be undertaken considering the costs of the infrastructure identified and the appropriate contribution proposed.
- 9.2. The assessment should highlight areas within the allocation that could achieve higher than 15% and areas where less than 15% are likely.
- 9.3. The assessment should look at the entire lifespan of the development and be informed by the phasing and delivery strategy.
- 9.4. All parts of this element of the Delivery Strategy that can be 'mapped' must be done so on GIS and provided to the Council.
- 9.5. The Viability and Affordable Housing Sensitivity Assessment must include key information on the following:
- Task 1: Liaison with landowners and developers
 - Task 2: Viability and Affordable Housing Sensitivity Assessment
 - Task 3: Identification of areas where more and less than 15% affordable housing is likely

Task 1: Liaison with landowners and developers

- 9.6. The National Planning Policy Framework advises that it is the *"responsibility of plan makers in collaboration with the local community, developers, and other stakeholders, to create realistic, deliverable policies. Drafting of plan policies should be iterative and informed by engagement with developers, landowners, and infrastructure and affordable housing providers"* (Paragraph: 002 Reference ID: 10-002-20190509).
- 9.7. To support the viability and affordable housing sensitivity assessment, a one half-day workshop will be required to engage with landowners and developers to gather their views on (among other things) profit expectations and risks associated with the development of the allocation.

- 9.8. An in-person workshop should be planned and costed for in the first instance to be held at Trafford Council offices. Officers from Trafford Council will attend the workshop.
- 9.9. Required outputs from Task 1:
- a) Summary of the process and outcomes of the workshop, including a review of the comments / suggestions regarding profit expectations and risks etc., along with an explanation setting out how comments/suggestions compare to the wider industry and standard practice in an easy-to-read summary report, providing transparency to the process.
- 9.10. Commercial sensitivities will need to be considered in any discussion and report thereafter, to facilitate a free and frank discussion.

Task 2: Viability and Affordable Housing Sensitivity Assessment

- 9.11. The Places for Everyone Plan is accompanied by a Viability Assessment which has already considered the overall viability of each allocation within the plan. The PfE Viability Assessment has been examined as part of the Plan's Examination in Public and is not the subject of the Main Modifications consultation closing on 06 December 2023, it is therefore considered to be an appropriate starting point for this work.
- 9.12. Policy JPA 33 requires the provision of infrastructure; however, it also requires the provision of a minimum of 15% affordable housing across the site.
- 9.13. Required outputs from Task 2:
- a) Incorporating the findings of the landowner and developer workshop, and based on the findings and conclusions of previous elements of this commission, undertake a sensitivity assessment of viability of the whole New Carrington over the lifetime of the plan/ build out of the allocation, applying:
 - i. A universal application of a minimum requirement of 15% on-site affordable housing provision.
 - ii. Application of 50% on-site provision and a 50% off-site financial contribution of the minimum 15% affordable housing requirement using the calculation(s) contained in SPD 1: Planning Obligations
 - iii. Application of a 100% off-site financial contribution of the minimum 15% affordable housing requirement using a method of calculation which would deliver the same number of affordable homes as on-site provision, having regard to real expenditure such as land acquisition and build costs etc.
 - b) A summary report setting out the findings of the above and relevant conclusions regarding the viability of the site over the lifetime of the plan/ build out of the allocation, including any appropriate recommendations to ensure the provision of a minimum of 15% affordable homes across the site.

Task 3: Identification of areas where more or less than 15% affordable housing is likely

- 9.14. Policy JPA 33 requires a minimum of 15% affordable housing to be provided across the site. Paragraph 11.326 of the plan provides additional clarity on the implementation of this criteria, and states that "it is possible that some parts of the allocation will need to deliver a higher proportion of affordable housing than others. This should be considered as part of the preparation of the masterplan, the delivery strategy and through individual planning applications, having regard to differing levels of viability within the site".
- 9.15. Consequently, it is logical and necessary to understand if there are any areas within the allocation boundary which may be able to provide more than or would struggle to meeting the minimum 15%

affordable housing provision when taking into consideration the costs of infrastructure identified in the earlier elements of this commission.

9.16. Required outputs from Task 3:

- a) Incorporating the findings of task 2, identify on a plan/map those areas within the allocation which are likely to be able to deliver more than 15% affordable housing on-site over the lifetime of the plan/ build out of the allocation.
- b) A report which sets out why, how and when those areas are likely to be able to deliver more than 15% affordable housing on-site, to what level e.g., 25%, 40% and in what timeframe(s) during the lifetime of the plan/ build out of the allocation.
- c) Incorporating the findings of task 2, identify on a plan/map those areas within the allocation which are likely to struggle to deliver 15% affordable housing on-site over the lifetime of the plan/ build out of the allocation.
- d) A report which sets out why, how and when those areas are likely to be able to deliver less than 15% affordable housing on-site and to what level e.g., 5%, 10%. and in what timeframe(s) during the lifetime of the plan/ build out of the allocation.

10. Provision of information

10.1. The Council will provide relevant information to enable the Consultant team to undertake the work. This will include relevant information from the following sources:

- a) Main Modifications version of the Places for Everyone Plan (2021) and associated background and evidence base documents including information relating to the Examination in Public
- b) New Carrington Masterplan (September 2020)
- c) New Carrington Historic Environment Assessment (HEA) (July 2020)
- d) New Carrington Topic Paper (July 2021)
- e) Ground investigation data – provided by landowners/ developers.
- f) Carrington Relief Road documents and plans
- g) DRAFT – New Carrington Transport Strategy 2023
- h) The GM Transport Strategy 2040 and associated documents
- i) 15 Minute Cities/20 Minute Neighbourhoods principles
- j) DRAFT Trafford Council Design Code
- k) Relevant planning applications and permissions within the site boundary
- l) TfGM Indicative bus routing information

10.2. Other documentation that the Council has access to, including Ordnance Survey data, which is required for the undertaking of the work will be provided to the Consultant team at no charge.

10.3. In addition, the appointed Consultant team will be required to meet relevant Council Officers when commencing the work to help establish some of the assumptions about the allocation and to collect relevant information. A programme of regular meetings will need to be established to monitor progress and milestones up to completion.

11. Management Arrangements

11.1. The Infrastructure Framework will be managed by the following officers:

- a) Caroline Wright – Strategic Planning and Growth manager – Trafford Council Project Director

b) Sarah Todd – Principal Transport Policy Officer – Trafford Council Project Manager

c) Paul Lewis – Senior Strategic Planning Officer – Trafford Council Assistant Project Manager

11.2. Together they will co-ordinate liaison between the consultant, Trafford Council, elected members, Parish Councils, the local community, landowners/ developers, Transport for Greater Manchester and other interested parties/ stakeholders, bringing in other relevant officers from the Council and partner organisations, where necessary.

12. Resources and Personnel

12.1. Tenderers must specify how their project team will be set up, who will lead it and the roles each member of the team will play and how the project team's experience meets the requirements of the brief. A contingency plan should also specify how the project team will be managed in the event of any staff changes.

12.2. CVs of the Project Director, Project Manager and other staff should be provided. The Council expects these staff members to be employed on this masterplan commission for its duration.

12.3. A clear day to day Project Manager must be identified as the main contact with full knowledge of every aspect of the project.

12.4. A costed schedule of inputs for each team member and their overall time requirements should be included.

13. Capability Statements and References

13.1. Bidders will be required to demonstrate a proven track record in relation to the preparation of such robust work by providing details of two comparative or relevant projects for different clients carried out by your organisation and members of the project team. Please limit each example to one double-sided A4 page.

13.2. Details should be provided of two independent referees (at least one Local Authority) for whom similar work has been conducted.

14. Fee Proposal

14.1. The overall budget for the Delivery Strategy is £175,000.00 and is broken down by the following lots (elements):

Lot 1

- Infrastructure Framework and Phasing and Delivery Programme - £100,000.00

Lot 2

- Infrastructure Costs
 - Civils Infrastructure – n/a
 - Buildings and social infrastructure - £20,000.00

Lot 3

- Proportionate Contributions and Funding Mechanism Strategy- £25,000.00

Lot 4

- Viability and Affordable Housing Sensitivity Assessment - £30,000.00

- 14.2. Tenders should clearly set out their fixed fee, including a breakdown of the fees for each of the persons involved in undertaking the study. This should cover the following:
- a) A breakdown of costs relevant to each element of the Delivery Strategy;
 - b) In person workshops and consultation events including materials for each element of the Delivery Strategy (as appropriate);
 - c) Inception meeting plus up to five additional meetings with officers for each element of the Delivery Strategy;
 - d) The number of hours and hourly rates for each member of the team for each element of the Delivery Strategy; and
 - e) Overall budgeted fee for the total project.
- 14.3. The fee for each element of the Delivery Strategy is fixed and includes all expenses, disbursements, excluding VAT.
- 14.4. Payment will be subject to suitable completion of agreed project milestones / key deliverables, with a percentage payment of the overall fee.
- 14.5. Tenderers should also note that the successful consultant may also be retained to provide expert advice (as required by the Council) on this element of the Masterplan if necessary. Additionally, the successful consultant may also be retained to provide expert advice (as required by the Council) in relation to the determination of planning applications within the wider New Carrington allocation area.
- 14.6. Tenderers are invited to consider how, as part of their bid, Social Value will be delivered if they were to be awarded the contract. Social Value can be delivered through Trafford Council priorities or those of the Greater Manchester Combined Authority (GMCA). Information is available at Social Value (star-procurement.gov.uk).

15. **Timetable**

- 15.1. Indicative timetable:

Stage	Month
Procurement	December 2023/ January 2024
Appointment(s)	February 2024
Project inception meeting	February 2024
Review baseline / Initial engagement with local community and key stakeholders	February - April 2024
Undertake all elements of Delivery Strategy	April – November 2024
Produce final Delivery Strategy	December 2024

- 15.2. This will include fortnightly progress meetings with the Trafford Council project team throughout the duration, at least half of which should be detailed in-person meetings/ workshops.

16. **Delivery of the Commission**

- 16.1. Tenders should provide a clear timetable for the delivery of the Delivery Strategy including dates for the completion of the draft and final reports.
- 16.2. By 31 **December 2024**, the Consultant team will deliver the following:
- a) Two printed copies of all outputs;
 - b) Electronic/ digital copies off all task outputs and materials;

- c) GIS mapping layers and associated tables, information and data of all options explored and/or taken forward; and
- d) An electronic copy of the final report (editable and non-editable formats) with any associated appendices and supporting raw data/ material.

16.3. The Delivery Strategy and any original material, including surveys, will be copyright of the Council.

16.4. The final report and appendices will need to be made accessible, so they are able to be read by a variety of different users on the Council's website.

17. Tender Returns

17.1. Please email the tender return by 12 January 2024 to:

sarah.todd@trafford.gov.uk

paul.lewis@trafford.gov.uk