



SPECIFICATION DOCUMENT

Merrington Lane Master Plan Brief

Specification Title: Merrington Lane Master Plan

Contact: Chris Myers and Graham Wood

e-mail : cmyers@sedgefield.gov.uk; gwood@sedgefield.gov.uk

Telephone Number: 01388 816166

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1. **INTRODUCTION**

- 1.1 Sedgefield Borough covers approximately 216 sq km of County Durham. Sedgefield's population is approximately 88,000 and is mostly concentrated in the four main towns of Spennymoor, Shildon, Ferryhill and Newton Aycliffe. Retail and other town centre functions are concentrated in Newton Aycliffe and Spennymoor. An Area Action Plan is currently being prepared for Spennymoor Town Centre.
- 1.2 The Merrington Lane area of Spennymoor is located to the south of the Town. The area is dissected from the rest of the Town by the A688. Two major employers (Thorn Lighting and Electrolux) dominate the Merrington Lane area of Spennymoor. However, this will shortly change. Thorn Lighting are in the process of moving their operations to Green Lane Industrial Estate and have outline planning permission for residential development on their current site. Electrolux have recently announced the closure of the plant. The closure process will be complete by mid 2009. Carrisbrooke Investments Ltd also has employment land at Merrington Lane, primarily located to the immediate south of Electrolux with tenants occupying their buildings. The former Spennymoor Greyhound Stadium is located in the northern part of Merrington Lane. The site benefits from full consent for a new access and remediation. The site also benefits from a "minded to grant" outline consent for a maximum of 100 dwellings of mixed house type subject to the completion of a S.106 agreement. Other land uses in the Merrington Lane area include the Sedgefield Borough Training Centre and the Coulson Street General Industrial Estate.
- 1.3 The Master Plan should have regard to the CABI guide "Creating Successful Masterplans" and the Government's new Planning Policy Statement for the preparation of Local Development Frameworks (PPS 12).
- 1.4 The commerciality of the Master Plan proposals will be carefully considered.
- 1.5 The area of land covered by the Master Plan is approximately 68 hectares and this is shown at Appendix 1. The Partnership believes that the area will take up to 10-20 years to develop.
- 1.6 The client for the Master Plan is the Merrington Lane Partnership. The Partnership is lead by Sedgefield Borough Council and includes all major landowners (and their successors in title) and is identified in Appendix 2. Key stakeholders at Merrington Lane are included in Appendix 3 - Strategic Framework.
- 1.7 The objectives for the Master Plan are as follows:
- To develop a new sustainable community;
 - To act as part of the evidence base for the determination of planning applications and the preparation of the Local Development Framework;
 - To focus on delivery and commercial reality; and,
 - To take account of Sustainability Appraisal.

- 1.8 The Master Plan will not form part of the emerging Local Development Framework. However, it will be a significant material consideration in the determination of future planning applications for the site.

2. **SCOPE OF TENDER**

- 2.1 The Partnership wish to appoint consultants to deliver an urban design and delivery-focused master planned solution for the future development of Merrington Lane. There will be a need to evaluate the current social, economic, transportation and environmental context to Merrington Lane and develop proposals for physical change to the area. It is essential that the appointed consultants prepare a realistic implementation strategy, which is accepted by the Partnership and which can be delivered.
- 2.2 The Master Plan will need to improve and develop the linkages between Merrington Lane and the Town Centre. There will be a need to take into account the emerging work of the Spennymoor Town Centre Area Action Plan and proposals for significant redevelopment at Green Lane Industrial estate.
- 2.3 Due to the long-term nature of the redevelopment of Merrington Lane, it is vitally important that the appointed consultants develop a strong stakeholder engagement strategy and with the local public via consultation. The appointed consultants will also need to work with County Durham Planning Aid North project to deliver effective engagement with local schools (this element of work is to be funded separately from the Master Plan commission).

3. **THE REQUIREMENTS**

- 3.1 In accordance with the CABE guide, the Master Plan must provide the Partnership with the following three elements:
- A Strategic Framework;
 - A Spatial Masterplan; and,
 - An Implementation Plan
- 3.2 The appointed consultants will be required to work quickly with the Partnership to agree the Strategic Framework for the Master Plan. The key elements of the Strategic Framework are provided in Appendix 3. The consultants should work with the Partnership to identify what additional baseline information will be required to enable the Master Plan to be taken forward.
- 3.3 The Spatial Masterplan should provide an urban design inspired, realistic and deliverable solution to Merrington Lane that pays particular attention to the relationship between built development, open and green space infrastructure, and the movement of pedestrians and vehicles between the site and the Town Centre. The Spatial Masterplan should also include the following elements:
- A vision statement;
 - Site and context appraisal;
 - Policy Review;
 - Feasibility appraisals;

- Planning and design principles;
 - Indicative design concepts and proposals;
 - Details of the proposed delivery strategy;
 - Travel Plan/Strategy/Transport Assessment; and
 - Infrastructure requirements.
- 3.4 Given the likely timescale for delivery, particular attention should be given to the Government commitment to develop zero carbon development and how that can be incorporated in the Masterplan.
- 3.5 The Implementation Plan should provide a realistic delivery strategy that provides the context for individual planning applications to be considered. The Implementation Plan should communicate clearly the development aspirations for Merrington Lane. The Implementation Plan should establish mechanisms for delivering design quality. Given the delivery timescale, it will also be important that the Implementation Plan provides a degree of flexibility.
- 3.6 The Implementation Plan should develop a management and maintenance strategy for the new public realm in Merrington Lane. It will also be important for the Implementation Plan to provide a comprehensive risk assessment.
- 3.7 The appointed consultants will be required to provide regular updates on progress to the Partnership, throughout the preparation of the Master Plan.
- 3.8 The Spatial Master Plan and Implementation Plan should be tested against the Sustainability Appraisal Framework that has been developed for the Borough's Local Development Framework.
- 3.9 A 'first draft' paper and electronic copy, including maps, of the Assessment Report by 14 November 2008. This will allow for comments to be incorporated prior to wider community engagement during December 2008. The appointed consultants will need to work with the Partnership to identify the extent and content of this engagement.
- 3.10 The final Master Plan is to be provided not later than 31 January 2009. Each Partner will require:
- 2 hard copies of the Final Assessment Report and Executive Summary
 - 2 digital file copies in digitised MS Word and PDF format on CD-ROM.

4. **CONTRACT AND SERVICE MANAGEMENT REQUIREMENTS**

- 4.1 The Corporate Policy and Regeneration Manager and Forward Planning Manager from the Borough Council will be the main project officers for the project although there will be managed involvement from members of the Partnership. In addition to normal contacts, meetings with the steering group will take place as and when required. Typical cost of these meetings, including mileage, should be included in the tender.
- 4.2 The appointed consultant will be expected to produce regular verbal or electronic updates. The tender proposal must include a suitable explanation

and commitment of the method of liasing with the client during the project. A project management structure that identifies key milestones and dates for their delivery must also be provided.

- 4.3 The successful consultants must be willing to appear at future public inquiries/examinations to defend the Master Plan (subject to suitable remuneration). Typical cost of this, including mileage, should be included in the tender.

5. **PROCUREMENT PROCEDURES**

5.1 Procurement Timetable:

Expression of Interest & tender period	E-O-I by 18 July 2008. Shortlisting by 1 August 2008. Tender return by 22 August 2008.
Tender analysis	26-29 August 2008.
Presentations by shortlisted consultants	W/c 1 September 2008.
Inception Meeting	
Reporting / Awarding process	W/c 8 September 2008.
Contract Start Date	15 September 2008
Contract End Date	31 January 2009.

- 5.2 One third of the fee will be payable on completion of the first draft with the remainder paid on completion of the approved final report.

- 5.3 It is considered that the masterplan team should include the following skill sets: urban design, surveying/economics, town planning and transport.

5.4 Evaluation Criteria

- Proposed Methodology and its accordance with the CABE guide “Creating Successful Masterplans”
- Evidence that previous Master Plans have withstood public scrutiny and commercial challenge
- Project Management capability, as demonstrated by previous Assessments
- Demonstration of technical capability / experience
- Competitiveness of proposal
- Transparency of cost information
- Demonstration that all tender requirements can be completed within the proposed time-scale
- Demonstration of Risk Assessment of the various elements of the study
- Evidence of planned contingency measures

5.6 Award Criteria

Q	Quality	55%
P	Price	15%
D	Delivery	30%
Overall Tender Score Total		100.00%

6. **FORMAT AND CONTENT OF RESPONSES**

Please could all tenderers structure proposals as follows (and read in conjunction with Instructions to Tenderers)

Summary

Financial Summary

Total contract price exclusive of VAT with any indicated expenses

Management Summary

Understanding the requirements

Consultant's view of requirements gained from the specification

Consultant's view of Aims of the assessment gained from the specification

Response to requirements

Proposed Methodology

Stages and tasks to be delivered

Project Team

Structure

CV's

Work programme including fee points

Methodology for liaising with client during the commission

Resource Plan

Details of arrangement for attendance at future Public Inquiries / Examinations

– subject to suitable remuneration – day rate

Relevant Experience

Resume of experience of similar studies completed over the past two years

Evidence that previous work has withstood public scrutiny and commercial challenge

Form of Tender

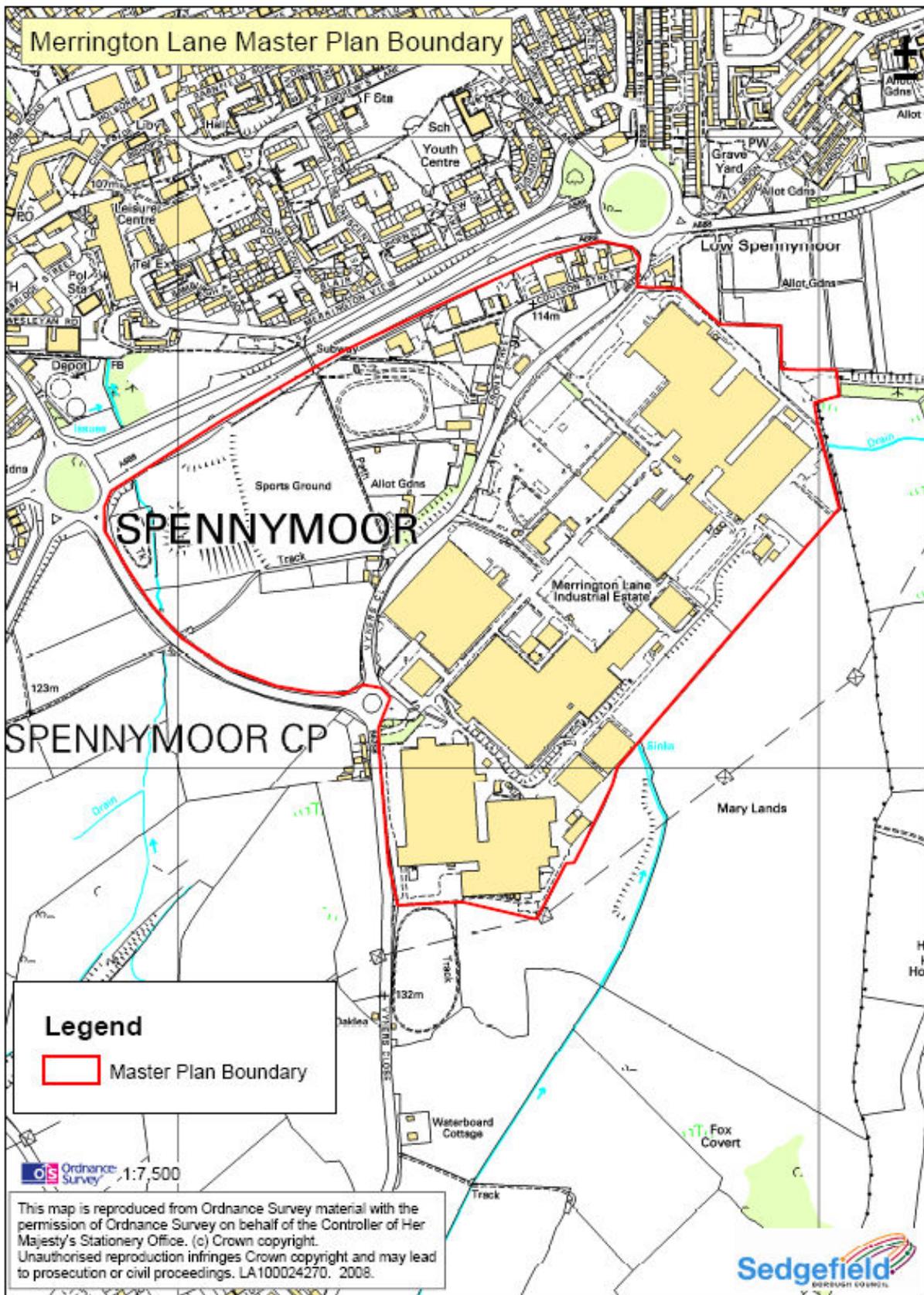
Tender documentation (5x Hard Copies) to be returned in the envelope provided marked for the attention of the Chief Executive. In addition an electronic copy of the submission should be provided in either Ms Word or PDF format

Any further supporting information relating to this contract. Such information can include:

- Details of business activities
- Business facts and figures
- Organisational details
- Details of Current services, technical environment, etc

Appendices

Appendix 1 – Site Plan



Appendix 2 - The Partnership

The Partnership, who are funding and leading the Master Plan, are:

- Carrisbrooke;
- Durham County Council;
- Electrolux;
- Sedgefield Borough Council;
- Thorn Lighting; and,
- Woodford Land.

Appendix 3 - Strategic Framework

The key elements of the Strategic Framework are as follows:

- physical parameters of the project
- vision and its rationale
- analysis of the potential catalysts for change
- outline business case
- identification of strategic delivery issues and options
- identification of key stakeholders – roles and responsibilities
- how the framework will inform design

Physical Parameters

The Merrington Lane area is located to the south of Spennymoor and is currently dominated by industrial activity. The area is broadly made up of the Coulson Street and Merrington Lane General Industrial Estates, the former Greyhound Stadium and the open land, known locally as the “Daisy Fields”. The two dominant employers are currently Thorn Lighting and Electrolux. There are a number of smaller companies that operate from both the Coulson Street and Merrington Lane Industrial Estates.

Whilst the Merrington Lane area can be easily defined, the major constraint relates to its relationship with the rest of Spennymoor. The Merrington Lane area is located to the south of the A688 bypass whereas the rest of the Town is located to the north of the A688. The only existing physical means of directly accessing the Town Centre is via an underpass. A key element of the Master Plan will be to identify strategies for improving movement for pedestrians to and from the Town Centre.

The redevelopment of the Merrington Lane area is affected by the Outline planning permissions that already exist for Thorn Lighting and the former Greyhound Stadium. Whilst the principle of residential development on these sites has been established through the granting of outline permissions, there will be some opportunities through the Masterplan to influence the reserved matters applications.

Vision

For Merrington Lane, there is a clear need to develop a “sense of place” through the preparation of the Master Plan. It will be important for the Partnership to develop an initial vision for the area (what type of place should Merrington Lane be and reasons why) and allow this to be tested through the development of the Master Plan. This new Vision for Merrington Lane will be developed before the start of the commission. A starting reference for the Vision is the Community Strategy and Local Development Framework Core Strategy.

The Community Strategy is the Local Strategic Partnership’s key document. This sets out a shared vision for where the Community want to see the Borough in 10 years time and provides a number of targets to help achieve this vision. There are significant linkages between the Community Strategy and the Local Development Framework, as the Local Development Framework provides a spatial expression of the Community Strategy.

The vision of the Local Development Framework, which will be incorporated in the Core Strategy, has been developed through the formulation of the Community Strategy. Our aspiration is for Sedgefield to be a Borough in which people are happy to live, work and do business. This means being able to offer high quality job opportunities, good schools, a wide range of good quality and affordable housing, low crime rates, a pleasant and accessible environment and first class services. This will help the Borough Council achieve Section 39 of the Planning and Compulsory Purchase Act 2004, which requires Local Planning Authorities to contribute to the achievement of sustainable development.

Therefore, the vision of the Local Development Framework is to ensure that Sedgefield Borough is a place where:

- People can live healthy, active and fulfilling lives as part of vibrant and strong communities;
- High quality businesses can prosper and local people have the confidence and skills to access the jobs that they offer;
- The natural and built environment is valued, conserved and enhanced; and,
- People can access the housing they want in attractive and safe neighbourhoods.

In summary, we want Sedgefield to be a Borough that is healthy, attractive and prosperous with strong communities.

Analysis of the Catalysts for Change

Over the last two years, the Merrington Lane area has been subject to structural economic changes that have resulted in a significant change in planning policy for the area. Thorn Lighting successfully put forward a case to move their operations to a new purpose built factory at Green Lane and permit residential development on their current site. Subsequent to this policy shift to permit residential development at the Thorn site on Merrington Lane, the former Greyhound Stadium has also been granted outline permission for residential development.

On 14th December 2007 Electrolux announced the closure of their factory. Electrolux will cease operations by the end of 2008 and be off-site by mid 2009. Given that residential development on Merrington Lane has already been established, it is likely that Electrolux will be looking to come forward with development proposals in the near future.

Sedgefield Borough Council, in Partnership with Derwentside and Chester-le-Street District Councils, has undertaken a comprehensive Employment Land Review. The Review was completed in May 2008 and is due to be agreed by the Borough Council's Cabinet in June 2008. The Review has found that the Borough has an over-supply of employment sites and there is a need to de-allocate employment land in both Shildon and Spennymoor. There is however a need to provide additional managed workspace and incubator developments to support indigenous businesses.

In October 2007, the Durham New Growth Point Bid was submitted to Government. The submission put forward realistic, deliverable and sustainable proposals for

accelerated employment and housing growth, together with supporting investment in 'quality of place' and connectivity.

The submission identifies that new growth will contribute strongly to the County's economic renaissance, attracting new and higher skilled residents to move to South and East Durham; transforming the quality of place, image and investment potential of our towns. New employment premises will have been delivered as part of mixed-use schemes, providing enhanced opportunities for people to live and work locally, reducing levels of out-commuting and encouraging shorter journeys to work and modal shift. The Merrington Lane area is identified as a Growth Point site for mixed-use development.

Business Case

The Business Case for the Development at Merrington Lane should consider

- the contribution of the proposed development in the regional, sub-regional and local economy;
- how proposals should address issues of demand and supply in the property market;
- the desire to maximise the potential financial and wider benefits to investors, public agencies and the local community based upon the findings of the Masterplan;
- a risk assessment of constraints, whether financial, legal or political, that could prevent implementation of the masterplan, and how to manage them;
- potential catalysts for change in the economic base of the area or the nature of the site; and,
- broad issues and options related to the implementation of development.

Strategic Delivery Issues and Options

Given the current predominant industrial use on Merrington Lane, the delivery of a mixed-use development will effectively take the form of a new Sustainable Community for Spennymoor. The significance of this cannot be understated and it will be important for the Master Plan to fully address strategic delivery.

As already stated in the analysis of the catalysts for change, there are two extant planning permissions for residential development. The capability of the Master Plan to influence the final design may be limited to some extent. However, one of the outcomes of the current UK 'Credit Crunch' is that volume house builders are not starting new sites. This immediate and short-term delay may allow the Master Plan to be completed before the Local Planning Authority considers any Reserved Matters applications. However it has to be recognised that reserved matters applications may be submitted and determined during its preparation and before it is completed. The masterplan will therefore need to be flexible to accommodate such outcomes.

A further key issue to consider is improving access for all to jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that the new development is located where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car. Of particular relevance is the movement of pedestrians and vehicles through the

site and the site's interconnectivity with the rest of Spennymoor. The Master Plan will need to investigate the potential to develop and improve the leisure and recreation facilities at Merrington Lane.

The Master Plan should seek to ensure that Merrington Lane contributes to global sustainability by addressing the causes and potential impacts of climate change – through development that reduces energy use and emissions, secures the highest viable use of decentralised and renewable energy resources, and take climate change impacts into account in the location and design of development.

Key Stakeholders

The following list of organisations are those that the Partnership consider to be key stakeholders in the preparation of the Merrington Lane Master Plan:

- Durham County Council
- Spennymoor Town Council
- School children (through Planning Aid North project)
- One North East
- County Durham Development Company
- Remploy
- Toplands
- Primary Care Trust
- Borough & Shadow Authority Councillors
- Coulson Street Businesses
- Sedgefield Borough Training Centre/Bishop Auckland College

It will be important for the appointed consultants to fully engage with each of the key stakeholders throughout the lifetime of the project.

How the framework will inform design

Achieving high quality, sustainable development-led design is vital to the delivery of the sustainable communities agenda for Merrington Lane, marrying an adequate supply of well designed and varied housing types and tenures with a vibrant public realm.

The design process should ensure the area has an enhanced and distinctive identity, which takes into account the key objectives of Building for Life:

- Creating a distinctive well structured layout in terms of building design and scale with well defined social space, street furniture, signage and lighting.
- Ensuring an adequate and varied provision of landscaping, planting and greenspace.
- Achieving a balance between roads, parking and pedestrianisation through changes in carriageway surfacing, width and where appropriate, improved crossing points to give greater emphasis on walking and cycling.
- Design and construction that out-performs statutory minima such as Building Regulations and promotes advances in technology, particularly with respect to greater energy efficiency / and a low carbon economy.

- Consideration towards well accessed, well maintained community facilities.

Reference Documents & Baseline Data

Sedgefield Borough Council

Local Plan

Local Development Framework

- Core Strategy
- Spennymoor Town Centre Area Action Plan – baseline assessment and emerging options report

Merrington Lane Contaminated Land Report

Planning Permissions for Thorn Lighting & former Greyhound Stadium

Employment Land Review

PPS 6 Retail Study (currently out for tender)

Strategic Housing Market Assessment

Strategic Housing Land Availability Assessment

Open Space Needs Assessment

Durham 'New Growth Point' Bid

Government Office for the North East

Regional Planning Guidance for the North East

Regional Spatial Strategy

Baseline Data

The appointed consultants will be provided with a complete set of baseline data but the following has been prepared to guide the tender documentation.

Planning framework

Regard should be had to the relevant planning policy documents in the preparation of the Master Plan. This will include PPS1 & its Climate Change supplement; PPS3; PPG4; PPG17; RPG1; RSS1; Borough Local Plan & Local Development Framework. The Master Plan should also take into account the evidence base already prepared and other policy documents, such as the Economic Strategy.

Land use patterns

Large manufacturing buildings dominate the Merrington Lane area. The Coulson Street Estate is a series of red brick buildings that are located adjacent to the A688. The existing large expanse of open space to the west of the area is known as the "Daisy Fields". There is an existing allotment site to the immediate south of the Daisy Fields, which are currently under occupied but could offer leisure opportunities for the new residents.

Physical condition

The built-up area of Merrington Lane has been subject to industrial activity for many decades. Prior to this, the area had railway tracks to service the former iron works at

Bessemer Park. A detailed site investigation will be required as part of any subsequent planning application. The site is a fairly flat site, lying in a small valley in the Wear Lowlands Landscape Character Area. The site is not subject to an Air Quality Management Plan.

Utilities

The successful tenderer will be provided with information – where available – relating to subsurface and surface routes of drainage, water, power and telecommunications.

Heritage

The buildings at Merrington Lane are non-descript brick buildings and industrial sheds offering no architectural merit. The site does however form part of the long distance setting to the Kirk Merrington Conservation Area. There are no Scheduled Ancient Monuments in the vicinity of the site. In terms of landscape character, the site is located in the Wear Lowlands Character Area. There is a County Wildlife Site in close proximity to the site (400m away from the closest boundary).

Movement

The site is bounded to the north by the A688 dual carriageway and two major roundabouts. The B6288 dissects the site on its route from Spennymoor to Kirk Merrington. The C152 provides a strong western edge to the area. The site is served by public transport provision that runs every 30 minutes. The site is linked to the Town Centre via a series of footways and cycleways. The most notable route is the Underpass that links the Daisy Fields with the Town Centre.

Demography

Communities that are deprived under the classification of the Index of Multiple Deprivation currently bound the Merrington Lane area. The social and economic impacts due to Thorn Lighting moving (with reduced employment) and Electrolux closing cannot be understated. This is likely to have an adverse impact for local communities. However, there are significant opportunities offered by the long-term redevelopment of Merrington Lane to improve the social and economic performance of Spennymoor.

People

The Master Plan will need to fully address the needs and demands of the new residents.

Ownership

The ownership details will be provided by the Partnership to the successful tenderer.

Legal constraints

There are no known legal constraints on the redevelopment of Merrington Lane.

Property market: demand and supply

Whilst the current property market is subject to significant constraints, resulting from the UK 'Credit Crunch', the redevelopment of Merrington Lane is likely to take up to 20 years. The redevelopment of the site should therefore be able to overcome any short-term economic issues.

Ecology

There is a single County Wildlife Site in close proximity to the Merrington Lane area, North Close Marsh. This CWS is located approximately 400 metres to the western edge of the Master Plan boundary. Any planning application will be required to undertake a Phase 1 survey.

Cultural provision and identity

There is no current cultural provision on the Merrington Lane site. However, the Master Plan should seek to utilise the provision of public art to allow new residents to navigate their way through the site.

Proposals

The Merrington Lane area currently benefits from a number of valid planning permissions and Committee resolutions to grant permission. These are:

Application No	Applicant	Location	Proposal	Agent
7/2005/0779/DM	N & L Seears	ELECTROLUX CAR PARK SPENNYMOOR CO DURHAM	CHANGE OF USE FROM CAR PARK TO MOTORCYCLE TRAINING AREA	N & L Seears
7/2006/0476/DM	Thorn Lighting Ltd &	THORN LIGHTING MERRINGTON LANE SPENNYMOOR CO DURHAM	DEMOLITION OF EXISTING FACTORY PREMISES AND REDEVELOPMENT FOR APPROXIMATELY 400 RESIDENTIAL DWELLINGS WITH ASSOCIATED LANDSCAPING AND INFRASTRUCTURE IMPROVEMENTS (OUTLINE APPLICATION)	Nathaniel Lichfield & Partners
7/2007/0703/DM	Woodford Land	THE FORMER GREYHOUND STADIUM MERRINGTON LANE CO DURHAM	CONSTRUCTION OF MEANS OF ACCESS AND REMEDIATION WORKS	Ward Hadaway
7/2007/0704/DM	Woodford Land	THE FORMER GREYHOUND STADIUM SPENNYMOOR CO DURHAM	RESIDENTIAL DEVELOPMENT COMPRISING A MAXIMUM OF 100 DWELLINGS OF MIXED HOUSE TYPE (OUTLINE APPLICATION)	Ward Hadaway
7/2006/0607/DM	Bells Trucks	BELL TRUCKS COULSON STREET SPENNYMOOR DL167RS	ERECTION OF EXTENSION TO PROVIDE ADDITIONAL OFFICE SPACE	Dickinson Associates