

PARTNERSHIP REGENERATION PROJECTS

EXECUTIVE MEMBER: Cllr Cath Giel
LEAD OFFICER: Mike Tichford
REPORT AUTHOR: Nash Thakker

Summary: A range of new regeneration projects are in development in Millom to complement the on-going North West Development Agency funded Market Town Initiatives (MTI). The report provides information on these projects and requests support from the Council.
The report presents amendments to the distribution of spend agreed at the Executive on 21 November 2006 for the use of British Nuclear Group funding.

Recommendation: That members agree:

1. Phase One of regenerating Millom Palladium - to provide the administration for bank rolling of £108,000 to enable Millom MTI to draw down NWDA allocated to the project to pay for the preparatory work needed to progress this project to Phase Two
2. Phase Two of regenerating Millom Palladium - to approve in principle to provide the administration of bank rolling for the regeneration of the Palladium up to £1.8m, subject to a detailed and fully funded programme being presented to the Council's Executive for approval.
3. Eco Tourism - to approve in principle to the administration of bank rolling for the Eco Tourism Feasibility Study up to £50,000 subject to a detailed and fully funded programme being presented to the Council's Executive for approval.
4. Millom Gateways Improvements – to approve in principle to provide the administration of bank rolling bankroll for the Millom Gateways Improvement Scheme up the value of up to £205,000 subject to a detailed and fully funded programme being presented to the Council's Executive for approval.
5. Millom Town Centre Master Plan Study - approve in principle to provide administration of bank rolling for the Millom Town Centre Master Plan Gateways Improvement Scheme up the value of up to £50,000 subject to a detailed and fully funded programme being presented to the Council's Executive for approval.

6. Haverigg Beach Improvements – approve in principle to provide administration of bank rolling for the Haverigg Beach Improvement up the value of up to £200,000 subject to a detailed and fully funded programme being presented to the Council’s Executive for approval.
7. Millom Network Centre - To the reallocate £33,000 of British Nuclear Group funding from the Millom Gateways project to support the Millom Network Centre.

Impact on delivering the Corporate Plan:

Collectively the above projects will improve the economic well-being of Millom, support employment, improve Millom’s Town Centre and generate wealth and prosperity.

Impact on other statutory objectives (e.g. crime & disorder, LA21):

The projects above will help to generate jobs, stimulate economic growth and improve the built and natural environment in Millom. These outcomes are expected to positively impact upon crime and deprivation indicators.

Financial and human resource implications:

Phase One of the Palladium Regeneration is part of the MTI currently supported and bankrolled by Copeland Borough Council.

For Phase Two of Millom Palladium regeneration, Eco Tourism, Millom Gateways Improvements, Millom Town Centre Master Plan Study, and Haverigg Beach Improvements, there will be further additional demands on human resource and financial implications due to the administration of bankrolling facilities.

The programmes will be managed by the MTI office in Millom, supported by West Lakes Renaissance and Copeland Borough Council officers.

There will be some financial and human resource implications for the Council in acting as Accountable Body. These are particularly for administrating claims and payments and for audit. The exact costs will not be known until all the projects are fully developed.

The Council requires that the costs of administrating the bank rolling of projects is recovered in full. As this is difficult to forecast it is recommended that the portfolio holder be delegated with officers to make a decision on the cost to be recovered as the project is delivered, to achieve as close as possible a zero net effect on the Council’s budget and other resources.

The Council’s costs have to be built in broadly to the overall programme costs and effectively comprise an additional ‘top slice’

of the project budget from the funder. Therefore the funder's agreement will be required.

Project & Risk Management:

All projects will be appraised and risk assessed as part of the appraisal process established under the Market Town Initiatives. The appraisal process will also be supported by the Regeneration Support Team.

Key Decision Status

- Financial: N/A
- Ward: N/A

Other Ward Implications:

The delivery of the projects outlined in the report will have considerable impact on the communities within the wards of Millom and Haverigg.

1. INTRODUCTION

- 1.1 As part of Millom MTI programme, a number of new regeneration projects are being developed for implementation in 2007/8 financial year.
- 1.2 For these projects to be successfully implemented, all will need the administration of bankrolling facilities from Copeland Borough Council. This is because a vast majority of external funding organisations are only prepared to provide cash on a defrayed basis and the MTI is not financially resourced, or constituted, to be able to carry the cost.
- 1.3 Realistically, Copeland Borough Council is the only organisation that can provide bankrolling facilities for the bulk of the proposed projects in this report. For local projects where it is deemed appropriate for Cumbria County Council to provide bankrolling facilities, they have been omitted from this report.
- 1.4 Besides Phase one of the Regeneration of Millom Palladium, this report is intended to highlight the projects that will need bankrolling in Millom in the foreseeable future. As each project is firmed up, detailed proposals will be presented to Members for approval.

2.1 PROJECTS

- 2.2 There are a total of five projects within the Millom MTI programme that will need bankrolling starting in the 2007/8 financial year. Most of these projects will be completed within that financial year with the exception of Millom Palladium, which is expected to be completed in 2008/9.

(1)	Phase One of regenerating Millom	
	£108,000	£108,000
	Phase Two Phase of regenerating Millom Palladium	£1,800,000

(2)	Eco Tourism	£50,000
(3)	Millom Gateways Improvements	£205,000
(4)	Millom Town Centre Master Plan Study	£50,000
(5)	Haverigg Beach Improvements	£200,000
Total Amount		£2,413,000

- 2.3 Preparatory work on the above projects has already commenced. Some like Phase One of the Palladium Regeneration will need to commence in April 2007 if the project is to keep within the NWDA approved expenditure profile. Others however need further developmental work and will be implemented in the course of the year.
- 2.4 Current status and progress of each project is outlined below.
- 3.1 REGENERATING MILLOM PALLADIUM
- 3.2 Millom Palladium is currently in a state of dilapidation and has accumulated several years of maintenance arrears.
- 3.3 In December 2005, Millom Market Town Initiatives commissioned a feasibility study to assess alternative uses for the Palladium and to consider the long term financial viability based on alternative uses.
- 3.4 The Feasibility Study recommendations favoured the regeneration of the Palladium as a reduced arts venue and the subsequent freed capacity to be converted into rentable office space. The reformat of the building would generate positive income streams to enable the building to financially sustain itself.
- 3.5 Based on the recommendation of the feasibility the Millom Market Town Initiative is seeking to appoint a Construction Design Team in April 2007 to take the project in stages through to handover to the employer. Details of the various refurbishment stages are outlined in the attached tender brief (see Appendix One).
- 3.6 The regeneration of the Palladium will be segmented into three distinct stages. The first stage will include appointing a Design Construction Team who will develop a detailed design brief, progress proposals into Planning Application and receiving planning approval. Stage One of regenerating the Palladium can be considered as the project's sunk costs and prerequisite to Stage Two and Three.
- 3.7 Concurrent to Stage One of the regeneration process, an appropriate funding consultant will be employed to start developing funding bids for the capital costs. It is estimated the capital cost of regenerating the Palladium will be in the region of £1.8m. Once this amount is secured, Phase Two and Three of the regeneration will commence.
- 3.8 Stage One will be funded entirely from the £108,000 NWDA's Market Town Cash that is already secured for the project. The MTI is now seeking Copeland Borough Council

to approve bankrolling facilities of £108,000 to enable Stage One of the regeneration to commence.

3.2 Providing the bankrolling facility will enable Millom MTI to take the regeneration process of the Palladium to the level where the project can start applying for cash and eventually secure the £1.8m need to refurbish the building.

4.1 ECO TOURISM STUDY

4.2 Millom's Tourism sector remains underdeveloped despite having the potential to grow and become a key generator of wealth and employment in the area. The current sector is highly sensitive to seasonal variations and the area does not overly benefit from the influx of visitors to the Lake District every year.

4.3 Need to develop new tourism products - With nuclear decommissioning as regards Sellafield gaining momentum, Millom tourism sector needs to diversify and develop new products that will appeal to visitors with high disposable incomes. Local natural assets are seen as key to that process.

4.4 Ecology based tourism - Millom is endowed with natural assets that currently add little economic benefit to the area's economy. These natural assets are "unique selling attributes" that can be developed and marketed to visitors. Over a period of time, tourism based on the natural attributes of the area will grow and become the main generator of wealth in the locality. A high value service industry thus replacing a prior economic engine of heavy industry.

4.5 Feasibility Study – There are a number of unknown issues that need to be considered with regards to developing ecology based tourism in the area. For example:-

- All the facets that collectively make up natural assets in the area will need to be identified.
- Strategies for branding and marketing local natural assets to encourage increased visitor numbers needs to be developed.
- New infrastructure necessary for the development of the sector needs to be identified.
- Ultimately strategies to entice the private sector to investment into Millom's ecology tourism will need to be formulated etc.

4.6 Following consultation with various agencies in Cumbria with interest in the tourism sector, Millom's MTI has produced a feasibility study brief to assess the potential growth of ecology based tourism in Millom and the surrounding hinterland (See Appendix Two).

4.7 The aim is to use that brief to appoint a suitably qualified consultant to assess the feasibility of developing the ecology based tourism in Millom. The cost of that feasibility study is expected to be in the region of £40,000 - £50,000.

- 4.8 The MTI is seeking funding from West Lakes Renaissance to cover the cost of undertaking the feasibility study. When that cash is secured, the project will need Copeland Borough Council to bankroll it.
- 4.9 The MTI is seeking funding from West Lakes Renaissance to cover the cost of undertaking the feasibility study. When that cash is secured, the project will need Copeland Borough Council to bankroll it.
- 4.10 Millom MTI is now seeking Members to approve in principle bankrolling facilities of up to £50,000 subject to all funding being secured in 2007/8 financial year.

5.1 MILLOM GATEWAYS IMPROVEMENTS

- 5.2 In January 2006, West Lakes Renaissance commissioned a feasibility study for creating a series of co-ordinated gateway features and environmental improvements in Millom. After extensive consultation with local people a number of gateway features were identified along with indicative cost.
- 5.3 In May 2006 the result of the Gateway Feasibility Report were presented to Millom Town Partnership. The Town Partnership considered the Report and a combination of gateway improvement schemes were selected for implementation. The selected features covered improving the profile of Millom on the A595, improving signage into Millom peninsular, thematic gateway features on the Town's Gateways to reflect the Town's heritage, environmental landscaping etc.
- 5.4 The cost of undertaking the gateway improvements is £205,000. In an initial discussion with West Lakes Renaissance, their officers indicated that they would consider funding 50% of Millom gateways programme.
- 5.5 Millom MTI is in the process of trying to secure the match-fund and at the present possible funders could include next year's BNG funding allocation for Millom, Landfill Tax, and the Aggregate Levy.
- 5.6 There are a few issues such land ownership and highway matters that need resolving before bids are submitted to the various funders.
- 5.7 Securing match-funding cash for gateway/environmental project can be challenging. It is not possible to specify when this project will commence. It is recommended, however, that Members in principle approve bankrolling facilities of up to £205,000 subject to all funding being secured in 2007/8 financial year.

6.1 MILLOM TOWN CENTRE MASTER PLAN STUDY

- 6.2 Millom's Town Centre continues to show evidence of further decline. For example, the Town Centre has excessive empty retail premises and high profile redundant buildings that have stood unused for many years. There has been a sustained trend to convert empty shops into residential dwellings. As a result retail floor space has reduced.
- 6.3 Millom Town Centre lacks a detailed vision as to how it should develop in the future or strategies to reverse the retail decline. Recently approved Planning consents for residential developments on the edges of its core retail area have resulted in the Town Centre being "boxed-in." As a result there is little land that it can potentially expand into in the future.
- 6.4 The Town Centre is being managed haphazardly and not much thought is being paid to its long term viability. In short, the core retail area is dying a slow death as a result of a solid strategy being sacrificed to short term tactics.
- 6.5 West Lakes Renaissance is assisting Millom's town partnership to develop a Town Centre Masterplan Brief. The brief will be used to appoint a consultant to undertake a comprehensive review of Millom's townscape and to identify actions that will help to safeguard the long term viability of the Town Centre. That brief is expected to be completed in March 2007.
- 6.6 In the initial discussion, West Lakes Renaissance officers indicated that they would consider funding up to 100% of the Town Centre Masterplan. However, that funding will need bankrolling by Copeland Borough Council when it materialises. In anticipation, Millom MTI is now seeking Members to approve in principle bankrolling facilities of up to £50,000 subject to all funding being secured in 2007/8 financial year.

7.1 HAVERIGG BEACH IMPROVEMENTS

- 7.2 Haverigg Beach area is the main leisure focal point for visitors and local people. It remains, however, unenticing and in need of environmental improvements.
- 7.3 Haverigg Beach is comprised largely of green space that is poorly landscaped, a play area which is in need of refurbishment, a dilapidated car park, visually unpleasant public toilet facilities and an unsightly used oil and bottle bank. In short the area is need of a complete makeover.
- 7.4 With the support of Copeland Borough Council's funding, Millom MTI contracted with Environmental Cumbria to develop costed proposals to improve the landscape around the beach. The first draft is expected to be presented to the Town partnership in early February 2007.
- 7.5 In addition to improve the landscape, the MTI has also been working with Millom Town Council to improve play facilities on the beach. The estimated cost of improving these

facilities is in the region of £54,000 and at the present we have already secured £33,000.

- 7.6 The aim is to combine the landscape and the play area improvements into a single project. This will improve the chances of the project to attract West Lakes Renaissance funding.
- 7.7 It is estimated that the cost of undertaking all improvements on the beach will be in the region of £200,000. A funding package is now being put together which will require bankrolling facilities from Copeland Borough Council. Millom MTI is now seeking Members to approve in principle bankrolling facilities of up to £200,000 subject to all funding being secured in 2007/8 financial year.

8. BRITISH NUCLEAR GROUP (BNG) FUNDING

- 8.1 A report to the Executive on 21 November 2006 secured agreement to the allocation of £33,000 of BNG funding to the Millom Gateways project and £17,000 to the Millom Network Centre. It is not considered possible to achieve spend on the Millom Gateways project within the time limit of 31 March. It is therefore recommended that the funding for the Gateways be reallocated to the Millom Network Centre which can achieve spend within the allotted period. The MTI and Council officers consider that the reallocation is a reasonable solution to avoid the loss of funding to Millom and will still meet the objectives of the MTI, the Council and the funders.

9. MANAGEMENT FEES

- 9.1 An appropriate management fee will be factored into every project costing to help offset the erosion of financial value incurred by the Borough Council in the process of bankrolling these projects.

10. CONCLUSION

- 10.1 When implemented, the five projects outlined in this report will help support the economic growth of Millom and serve as a catalyst for further regenerating projects.
- 10.2 Providing the administration of bankrolling for the Palladium will enable Millom MTI to take the regeneration process to the level where the project can start applying for cash and eventually secure the £1.8m need to refurbish the building.

List of Appendices

Appendix Two - South Copeland Ecotourism Development Study

List of Background Documents:

Millom and Haverigg Operational Plan 2005
Palladium Feasibility Report March 2006
Millom Gateway Study
Partnership Regeneration Projects – Report to

Executive, 21 November 2006

List of Consultees:

Corporate Team, Brian Kirkbride Steve Tickner,

Appendix One

**MILLOM PALLADIUM
REDEVELOPMENT**

CONSULTANTS BRIEF FOR THE APPOINTMENT OF A CONSTRUCTION DESIGN TEAM

NOVEMBER 2006

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1.0 PROJECT PROFILE

- 1.1 The Millom Palladium Redevelopment comprises the design and construction of a multi-use facility based on existing run down theatre to provide:-
- A reduced capacity of arts and entertainment venue with an auditorium
 - Font-of-house development
 - Providing a Youth Centre and associated offices at the basement
 - Office units on first and in the loft space for rent
 - External works and improved building aesthetics
 - Changing ancillary facilities and other services to the requirement of the refurbishment process

Background

- 1.2 In December 2005, Millom & Haverigg Economic Development Group (M&HEDG) commissioned a feasibility study to assess alternative uses for the Palladium and to consider the long term financial viability based on alternative uses.
- 1.3 In March 2006, the feasibility report was presented to M&HEDG, favouring the regeneration of the Palladium as a reduced arts venue but also housing other alternative uses such as office space to house macro-enterprises. The feasibility report was later ratified by M&HEDG and the Millom Amateur Operatic Society (who are the current owners of the Palladium).
- 1.4 Based on the recommendation of the feasibility report, M&HEDG would like to appoint a Construction Design Team that will take the project in stages through to handover to the employer.
- 1.5 The anticipated budget for the redevelopment, including external works is approximately £1.8m. This is inclusive of fittings, Construction Design Team fees, exclusive of statutory authority fees and VAT. However this amount may alter following a detailed design proposals.
- 1.6 The anticipated Construction Design Team fees, excluding statutory and legal fees, will be based on the anticipated capital budget in the region of 12%. However, evaluation of the tender proposals being put forward by the Construction Design Team will also be based on a demonstrable quality of service.
- 1.7 In parallel with the Construction Design Team, a business plan will be formulated by an independent Funding Consultant, who will put together a funding package for the entire project. Therefore funding will need to be in place for Stage Two and Stage Three to commence.
- 1.8 Millom & Haverigg Economic Development Group is now inviting bona fide competitive Consultants' Proposals and Fee Tenders from Teams of Consultants to take this project in its stages to handover.
- 1.9 At the present ([October 2006](#)) the ownership of the Palladium is in the process of being transferred from the Millom Amateur Operatic Society (MAOS) to the Millom and

Haverigg Economic Development Group (M&HEDG). The appointment of the successful bidder will take effect when the transfer is completed.

Consultant's Proposals and Fee Tenders

1.10 As part of selecting the successful Construction Design Team, tenderers are requested to submit their Consultant's Proposals in a "two-envelope" system. The first envelope should contain the Proposals which will be discussed at an interview. A second sealed inner envelope containing the Fees Tender will be opened following the interview, if the Proposals meet the Employer's requirements.

1.11 The lead officer for M&HEDG is:

Mr. Nash Thakker
Millom & Haverigg Market Town Initiative Manager
Millom Council Centre
St Georges Road
Millom
Cumbria
LA18 4DD
Tel: 01229 776 312
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E-mail: athakker@copelandbc.gov.uk

All Consultant Proposals should be submitted by X:00pm, **XXXX**

2.0 INTRODUCTION

- 2.1 Millom palladium, situated on St. Georges Road, Millom, Cumbria, is currently in state of dilapidation and has accumulated several years of maintenance arrears. The building is still used by the public but this is a situation that cannot be sustained for much longer.
- 2.2 Millom Palladium was built in 1912 through a partnership of local business men and artisans and people who provided the labour. They all wanted an arts venue in the Town.
- 2.3 After the building was completed, it was exclusively used to stage shows. However with the advent of moving pictures, the business men sold their share to NBC Cinema in the 1920s even though Millom Amateur Operatic Society (MAOS) continued to have access and hold their shows in it.
- 2.4 Following the closure of Iron Works in the late 1960s, NBC cinema ceased its operations in Millom and in early 1970s. The old relationship that has existed between the NCB and MAOS for over 50 years ended and the Palladium was in danger of being lost to a private developer.
- 2.5 Following a long fundraising campaign by the people of Millom, the Palladium was purchased and vested to MAOS. Since then it has been used mainly as an arts venue.
- 2.6 In the 1980s and 1990s the Palladium experienced a sustained reduction in the number of its customers. With a corresponding reduced income levels, the building was not adequately maintained and as a result it has now cumulated several years of maintenance arrears.
- 2.7 The structural integrity is considered sound. However the building needs to be modernised to meet current building standards and also be reformatting to increase its general appeal and attract increased users.

Recommendations of the Palladium Feasibility Study

- 2.8 The Feasibility Study also assesses the refurbishment options and the long term financial viability for the Palladium. It recommended that the arts capacity in the building needed to be reduced and the released capacity developed into offices and youth space.
- 2.9 The feasibility study identified Option 2 as the preferred option subject to funding being available. This is the option we are seeking Consultants' Proposals and Tender Fees for.

Option 2

- 2.10 Under Option 2, it is anticipated that the Palladium will:-
- Retain and refurbish the existing ground floor auditorium and stage. This will provide the wider arts venue instead of the current predominantly stage shows.
 - Refurbish the building fabric and services
 - Alter and extend the building to provide the necessary accommodation.

2.11 The completed project must comply with all current legislation, standards, code of practice, licences etc.

Change of Ownership

2.12 As part of the feasibility study's recommendations, the ownership of the Palladium is being transferred from Millom Amateur Operatic Society. It is anticipated in the near future the building will be vested to Millom Haverigg Economic Development Group. This contract will be effective once this process is deemed completed by M&HEDG

3.0 **THE CONSTRUCTION DESIGN TEAM**

- 3.1 M&HEDG is seeking to retain a Design and Construction Team to manage the regeneration process through the three key stages described in this brief.
- 3.2 The successful Construction Design Team will work with M&HEDG to develop a design brief for the works and all the way till handover time.
- 3.3 It is expected the Construction Design Team will be formed of appropriate construction professionals to take this project through the various stages to hand over time. This will include an Architect/Contract Administrator.
- 3.1 The submitted Consultant's Proposal will need to identify the principal professional practices and their roles in the progression of this project.
- 3.2 The Consultant Proposals must include the following information about each principal professional practices that will be directly involved with the project,
- Key named personnel allocated to the project
 - Curriculum vitae of key personnel
 - Relevant experience
 - Professional Codes of Conduct/Conditions of Engagement
 - Current Professional Indemnity Insurance
 - The names of two confidential referees and lists of clients
- 3.3 The Consultant's Proposals should cite similar projects undertaken by the Team Members. References will be sought for the Design Construction Team.

4.0 THE DESIGN BRIEF AND CONSTRUCTION DOCUMENTATION

- 4.1 The Construction Design Team will work in association with M&HEDG, other key stakeholders in Millom area beyond to develop the detailed design brief for the scheme of works, drawings, specifications, schedules, bills of quantity and costing, statutory approvals and all documentation, appropriate to receive competitive tenders and appropriate to manage the project successfully to completion.
- 4.2 Tender Proposals should include a basic Project Programme for the project. A basic Design Brief for the Palladium is attached below.

Basic Design Brief

- 4.3 The basic brief taken from the feasibility study included the following schedule of accommodation:-
- 4.4 **Basement Floor:-**
Develop an extended self-contained accommodation for Youth Partnership in the basement with:-
- An independent access
 - Associated toilets
 - Kitchenette
 - Office space
 - A counselling room
 - Workshops and access to green 'teen' space

Separate basement accommodation for:-

- Changing accommodation for auditorium use
- Independent hire by individuals or groups
- Separate office/workshop space, with independent access for Connexions
- Toilets and cloakroom for the auditorium
- Room for equipment and storage
- Services/Boiler room

4.5 Ground Floor:-

- New main public entrance
- Main Hall Auditorium and Stage, wardrobe and store/workshop
- Lounge area, bars, managers office, box office and service kitchen
- Separate access to first and second floor Office space
- New foyer, exhibition and display space
- Wheelchair accessible toilet

Conservatory extension to main hall:-

- Lounge
- Dining/Function Room
- Meeting/Seminar space

- Exhibition space
- Access to the bar and service kitchen

First Floor

- Community/Commercial Office space
- Auditorium Control room
- Shared kitchenette and toilets

Second Floor/Loft

- Community/Commercial Office space
- Kitchenette and toilets

Vertical Circulation

- New public lift and stair tower
- Separate staircase to first and second floor offices
- Disabled persons access to all floors

Service Road

- Office, disabled persons and essential user parking spaces
- New access ramp and steps to office entrance
- Function car parking spaces

Green Space

- Public exhibition/entertainment on green space
- Hard court area for Youth Partnership
- Grassed area for games
- Bandstand Area
- New access ramp, steps and paths to the green space
- Trafficable access for equipment

5.0 THE CONTRACT DOCUMENTATION

- 5.1 It is anticipated that the contract will be let in a traditional building contract format, using JCT 2005 Standard Form of Building Contract, with Quantities.
- 5.2 The Construction Design Team will be required to advise the employer on the selection of suitable tendering contractors, and undertake the tendering process.
- 5.3 A separate clerk of works will not be appointed by the employer. The Construction Design Team will undertake site inspections in the construction phase. The Architect/Contract Administrator should allow for a minimum of two site visits per week through the construction phase.

PERFORMANCE REQUIREMENTS

Architect/Contract Administrator

- 6.1 The architect/contract administrator will be required to co-ordinate the work of the Construction Design Team in the delivery of the completed project.
- 6.2 The architect/contract administrator will be responsible for the development of the Design Brief will be required to chair regular Consultants and Contractors meetings and report regularly to the Employer.
- 6.3 The architect/contract administrator will carry out the design, construction documentation and drawings, specifications, site supervisions etc in accordance with RIBA plan of work stages C – L and generally as follows:-

Stage One

Work Stage C

- **Outline Proposals** - prepare outline proposals for preliminary approval.

Work Stage D

- **Scheme Design** - develop a scheme design following discussions around stage C
- Liaise with any other Consultants and advise where their work affects programme & budget.
- Arrange with the Quantity Surveyor to provide a cost estimate
- Enable agreements over spatial arrangement, materials and appearance.
- Prepare and submit a planning application.

Please note that a maximum budget £50,000 has been allocated to Stage one.

Stage Two

Work Stage E

- **Detail Design** - finalise detail design including co-ordination with other Consultants and suppliers and integration of materials & sub-contracted work.
- cost checks.
- Advise where appropriate on the (CDM) Construction (Design and Management) regulations 1994, 2003.
- Prepare and submit Building Regulations Application and any other statutory requirements.
- Work Stage F & G: prepare production information & bills of quantities - Drawings, schedules & specification; provide information to the Quantity Surveyor for bills of quantities.
- Complete information to enable contractors to tender.

Work Stage H & J

- Tender Action & Project Planning – provide advice on a list of tenderers.
- Issue tender documents to agreed list of contractors.
- Receive tenders, advise on results and contractor appointment
- Prepare the building contract and arrange signatures.

Stage Three

Work Stage K:

- Commencement of construction
- Operations on site - Administer the terms of the building contract during work on site.
- Visit the site at intervals to inspect the progress and quality of the work
- Make periodic financial reports to the employer including any cost variations.

Work Stage L:

- **Operations on site** - Administer the terms of the contract related to completion of the work.
- Give general guidance on maintenance.
- Provide record drawings as required.
- Co-ordinate all completion certificates required for the operation of the facility
- Hand over the completed building.

Quantity Surveyor

- 6.4 The Quantity Surveyor will be required to carry out the following:-
- Prepare an initial Cost Plan/Estimate for the works.
 - Update the Cost Plan/Estimate as required throughout design development.
 - Attend Design Team and other meetings as required, including liaison and negotiations with prospective Contractors.
 - Update and monitor the design against the Cost Plan/Estimate, as required throughout design development.
 - Preparation of Tender Documents (using the JCT 2005 Standard Form of Building Contract with Quantities), comprising General Conditions, Preliminaries, Measured Works, Standard Method of Measurement 7 (SMM7). Provisional Sums, Dayworks, Form of Tender and Appendices. It is anticipated the Architect/Contract Administrator will prepare a Specification of Materials and Workmanship. Mechanical and Electrical Works to be included and measured on a “systems” basis.
 - Selection of tendering Contractors, in association with the Employer and Architect/Contract Administrator.
 - Examination of tenders received and provision of a tender report recommending acceptance of a tender.
 - Attendance at a pre-contract meeting, and negotiations with prospective Contractors.
 - Agreement of a Proposed Contract Sum, and issue of Contract documents.
 - Preparation of monthly valuation recommending interim payments.
 - Preparation of Monthly financial statements detailing variations both issued and anticipated and indicating anticipated final cost.
 - Measure and agree variations and prepare and agree the final account.
 - Liaise with other members of the Consultants Team as required.
 - Attend Site Progress and other meetings as required.

Structural Engineer

- 6.5 The Structural Engineer will be required to carry out the following:-
- Assessment of the existing building for the suitability of the chosen design.
 - Attendance at Design Team meetings.
 - Liaison with Construction Design Team on design matters.
 - Carry out structural analysis of all applicable elements.
 - Complete the structural design appropriate for the finalised scheme.
 - Prepare and submit calculations for Building Regulations.
 - Prepare technical specifications for inclusion in Bills of Quantity.
 - Carry out site inspections during the Construction period,
 - Attend progress meetings during the Construction period.

Planning Supervisor

- 6.6 The planning supervisor will be required to:-
- Carry out services in accordance with the Construction (Design and Management) Regulation 1994 & 2003, and subsequent revisions.
 - Advise the Employer and designers on matters of Health and Safety.

- Formulate the pre-tender Health and Safety Plan and issue notices, advise on the Contractor's Health and Safety plan
- Carry out inspections and receive documentation and collate the Health and Safety file.

Disability Access Consultant

6.7 The completed project will comply with the requirements and recommendations of Building Regulations Approved Document M, BS 8300: 2001; BS 5588 part 8 and the Disability Discrimination Acts 1995 & 2005 and best practice.

6.8 The Access Consultant will:-

- Have an accredited qualification, and will advise the design team on general access issues, and in detail on the building design specifications, equipment and furnishings.
- Prepare an access statement as part of the design brief and planning application.
- Advise the management team on disability-related issues.

Services Consultant

6.9 The Services Consultant will be required to carry out the following:-

- In the initial inception to define the nature and extent of the services required and to develop a design brief and confirm budget allocations.
- Attendance at Design Team meetings.
- Prepare mechanical and engineering designs that are cost effective in both capital and life cycle aspects, with energy efficiency and sustainability being prioritised.
- Mechanical and Electrical engineering designs to cover the following, including the preparation of designs, specifications and documentation for the purpose of obtaining competitive tenders:-
 - Heating, ventilation and comfort cooling/air conditioning
 - Domestic hot and cold water services
 - Automatic controls
 - Power distribution
 - Lighting and emergency lighting
 - Fire detection and alarms
 - Security systems & CCTV
 - Telecoms/data systems
 - External Lighting
 - Utility services
 - Co-ordination of any specialist installations such as stage lighting and sound systems
 - Induction loop installations
 - Lightning protection systems
 - Lift Installations
- Assist the Construction Design Team in the Tender stage.
- During the installation stage, include periodic site visits to ensure the works are being carried out in accordance with the specification requirements, dealing

with contractors technical queries and assisting in the settlement of interim and final accounts for the services works.

7.01 Others:-

- Asbestos Consultant/Subcontractor
- Acoustic Consultant

8.0 CONFIDENTIALITY

- 8.1 Any information which, directly or indirectly, the Consultant has obtained or will obtain from Millom & Haverigg Economic Development Group or partners in connection with the project or in the course of its performance is to be kept strictly confidential at all times and is to be used solely for the purpose of its performance. Unless the prior written permission of Millom & Haverigg Economic Development Group is obtained, no matter arising from this commission (including the confidential information mentioned above) may be communicated to the press or any other outside person, nor may it be published or circulated to the press or any other outside person, nor may it be published or circulated whether orally, in writing, by photograph or otherwise. The Consultant is to ensure that anyone he/she employs or engages on the project is aware of all these provisions as to confidence and that a contractual obligation is placed upon them to observe them.

9.0 APPOINTMENTS AND PAYMENT OF FEES

- 9.1 Construction professionals will be appointed on direct appointments by the Employer.
- 9.2 Professionals must submit evidence of current and appropriate professional indemnity insurance, as part of the Consultant's Proposal.
- 9.3 Successful professionals will need to submit copies of their professional institute's standard conditions of engagement.
- 9.4 The Consultant Team must have adequate and appropriate financial and staffing resources to comply with defrayed stage payments.
- 9.5 The Construction Design Team will be required to demonstrate the quality and level of service to the project and will be asked to attend an interview as part of the evaluation process.
- 9.6 The employer retains the right to terminate the engagement of a professional practice should their conditions of engagement be contravened.
- 9.7 It is important to note the following. Whilst the employer anticipates engaging the Construction Design Team for the total project, this will be subject to the availability of funding, which will be determined at completion of Stage one. Without all funds being in place, stage two and three will not go ahead.
- 9.8 **Payment profile**

10.0 EVALUATION OF CONSULTANT'S PROPOSALS

- 10.1 The appointment of the Consultant will be assessed on the basis of the most cost effective, taking into account both price and quality. The value assessment of the fee bids will be based on the procedures detailed in "The Procurement of Professional Services – Guidelines for the Value Assessments of Competitive Tenders" published by the Construction Industry Council.
- 10.2 The evaluation of the proposals will be based 60% on quality and 40% on price, with the weighting applied as in form B of the agreement.
- 10.3 The quality assessment will be based on the criteria scheduled below. The Consultant shall include detailed information presented in the same format as the schedule below to facilitate easy and accurate assessment. It may be detrimental to the Consultant's bid if the details provided are not in the required format.
- 10.4 Qualitative criteria:-
- Clarity upon how the project is to be delivered.
 - Capabilities and experience of the proposed individual Consultants and their level of involvement.
 - Evidence of successful delivery of similar projects.
- 10.5 The Consultant Team will be required to attend an interview and give a presentation, following the submission of the Consultant's Proposal, before any appointment will be made.
- 10.6 Tender Proposal documents are to be returned in a two-envelope system. The first envelope containing the Consultant's Proposal will be discussed at an interview. The sealed inner envelope containing the Fee Tender, will be opened following the interview, if the Proposal meets the Employer's requirements.
- 10.7 The Consultant Team shall demonstrate in the Proposal how it will carry out the services and indicate its own preferred programme.
- 10.8 The appointed Consultant Team will agree to carry out the work in accordance with this brief to complete the works by the agreed dates of completion. The Consultant Team will not subcontract any aspect of the work unless specified in advance and agreed by the Employer. The Consultant Team will work to a contract for services and, if a company, will have the status of independent contractor and will be responsible for all tax liabilities and National Insurance contributions.
- 10.9 The Employer is not bound to accept the lowest, or any Consultant Proposal and Fee Tender, and is not liable for any costs incurred in preparation. Reimbursement for travelling expenses will be made. Expenses incurred in the development and submission of your tender proposals will not be reimbursed.

9.9 To effectively evaluate all tender proposals received, you are advised to profile your cost based on the table below.

Stage	Percentage Payment
Stage One	25% (but the amount must not exceed £50,000)
Stage Two	50%
Stage Three	25%

10.10 The completed Consultant's Proposal and fee Tender must be returned to Mr Nash Thakker, Millom & Haverigg Economic Development Group, by the time and date stated in the letter of invitation.

11.0 TENDER

- 11.1 The Tender evaluation will be based on a Two-Envelope System (see previous clauses).
- 11.2 The Consultant's Proposal shall be put in the outer envelope and addressed to **Mr Nash Thakker, Catherin Ponting??**
- 11.3 The Fee Tender shall be enclosed in a sealed inner envelope.
- 11.4 An Interview process will evaluate the Consultant's Proposal and identify preferred Consultants Teams, in order of merit.
- 11.5 The Fee Tender of the preferred Consultant will then be opened and considered.

Tender Document

for

**South Copeland
Ecotourism Development
Study**

Section One - Scope and Context

- 1.1 Tourism has an increasingly important role to play in rural economies. West Cumbria is a case in point and, as a result of the success of ongoing destination marketing initiatives, the West Cumbria coast is becoming increasingly popular as a tourist destination. At present much of the area's tourism activity takes place within and around the towns (notably Maryport and Whitehaven) and small settlements (notably Seascale and St Bees) along the coastline although increasingly visitors are being introduced to the area's dunes, marshes and estuaries. Nevertheless south Copeland generally and the Millom area in particular, have remained something of a backwater.

- 1.2 An audit of West Cumbria's tourism product and market potential (ASH Consulting Group 1997) identified a lack of any co-ordinated approach to interpreting and promoting the natural environments of the area's coastline and it is doubtful whether this situation has changed in subsequent years. This failure is regrettable given the outstanding nature of much of the coastal environment and is in marked contrast to the approach adopted on the Solway AONB, to the north, where the natural environment and its wealth of wildlife provide a focus for attracting visitors. Whilst recognising the need to promote South Copeland's natural assets, it is essential to ensure that any future product development respects and safeguards the more fragile ecosystems and habitats.

- 1.3 In recognition of the need to diversify Millom's tourism base to safeguard the long-term economic benefit of tourism to the town and its hinterland, one of the key aims identified in the Millom Operation Plan (2004), prepared as part of the submission to secure MTI funding, is to develop Millom's tourism product with long term environmental protection and enhancement at its heart. To address this matter, a long-established local regeneration partnership, the Millom and Haverigg Economic Development Group (MHEDG), the driving force behind the MTI programme, wishes to explore the potential of the area for ecotourism development. MHEDG feels that the area offers significant

opportunities for eco-tourism and have decided that a detailed study that identifies how this potential could be realised, represents the appropriate way forward.

- 1.4 The MTI programme is currently in the second year of a 3-year programme of investment. The MTI grant is in the region of £1million. Complementing the MTI is a funding programme supported by West Lakes Renaissance which has the potential to release a further substantial investment into the area. Millom is therefore well-placed to transform itself into a thriving market town to enhance the quality of life for its local community and become an attractive destination for visitors to the area.
- 1.5 Millom set in outstanding countryside, in an area of great natural beauty which includes the backdrop of Black Combe rising to the north-west, the superb sands of Haverigg and the grand sweep of the Duddon Estuary, with a stunning backdrop of the Lake District National Park. In fact the greatest strength of the study area is undoubtedly its natural environment which, combined with a variety of attributes such as coastal activities, bird watching, water sports and museums, suggest potential as a tourist destination.
- 1.6 While other parts of the Cumbrian coast such as the Solway AONB and the Lake District Peninsulas (Furness and Cartmel) now have a strong and distinctive tourism brand, tourism development in south Copeland area has been slow. The area lies within the operating area of the Western Lake District Tourism Partnership but because of its peripheral location has perhaps not received the focus necessary to develop and promote its tourism product. While the south side of the Duddon Estuary sits within the Furness Peninsula marketing area, the north side has not benefited from the Lake District Peninsulas brand. Even in comparison with other parts of the west Cumbrian coast, Millom and its hinterland remains something of a poor relation. However the natural product exists and the aforementioned landscapes combine to give Millom a unique identity and tourism product.
- 1.7 Nestling between the Lakeland fells and the Irish Sea, the Duddon Estuary is the “jewel in the crown” of the study area. It is a dynamic and diverse environment and must be one of the most scenic and unspoiled, yet little visited, estuaries in Britain. The expanses of sand

and mud flats laid down by retreating glaciers thousands of years ago are constantly reworked by the tides providing unique and varied habitats. To protect this unique estuary it is designated as a;

- **Special Protection Area (SPA)** under the European Birds Directive,
- **Special Area of Conservation (SAC)** under the European Habitats Directive,
- **Site of Special Scientific Interest (SSSI)** under the Wildlife & Countryside Act 1981 (as amended), and a
- **Ramsar site** (a wetland of international importance under the Ramsar convention).

1.8 The European Habitat and Bird Directive's aim to maintain the rich diversity of European wildlife, taking account of economic, social, cultural and regional requirements. Under the Directives, each country in the European Union has put forward a selection of sites on land and at sea which include the best examples of a variety of vulnerable habitats and species. This network of protected areas is called the Natura 2000 series and includes SPAs. Included within the protected designations of the Duddon Estuary is the Hodbarrow RSPB reserve, which is something of a hidden jewel, supporting a diverse array of flora and fauna, providing interest throughout the year, be it Natterjack Toads in the spring, several species of orchids, scarce butterflies and colonies of breeding terns in the summer or large numbers of wildfowl and waders in autumn and winter. Although well-known by Cumbrian birdwatchers, the reserve does not attract large numbers of visitors and the RSPB does not promote Hodbarrow as a "flagship" reserve, and have deliberately kept visitor facilities to a minimum.

1.9 Although the Millom Operational Plan and the town's MTI status have been the catalyst for this study, focussing on Millom and its immediate hinterland, it is recognised that the catchment area for an initiative of this kind needs to offer a critical mass of facilities and attractions. The study area has therefore been defined as South Copeland and the accompanying map (Fig??) identifies the approximate boundary, although inevitably there will be considerable blurring of the edges. In addition the proximity of the Lake District National Park cannot be ignored, nor can such outstanding natural environments as the Duddon Mosses at the head of the estuary, and Sandscale Haws on its south side, sites of national importance for their flora and fauna, which are located in South Lakeland and Furness respectively. At the northern extent of the study

area the estuaries of the Esk, Irt and Mite, which together form the Ravenglass complex, combined with the National Nature Reserve at Drigg Dunes and the Cumbria Wildlife Trust reserve at Eskmeals offer further complementary attractions for the ecotourist.

Section Two - Requirements of the Study

- 2.1 The Millom and Haverigg Economic Development Group wishes to commission a study by an independent ecotourism consultant to explore the feasibility and potential of developing ecotourism in the area. The aim of the study will be to produce an overall project plan for the South Copeland Ecotourism project. The study will develop a package of projects, which can be taken forward to support the development of ecotourism-related facilities. It will include an overall spatial plan for the location of facilities, detailed site plans, business models (including build costs and operational costs) and operational plans for each facility, architects' drawings and a comprehensive funding strategy. This should include an assessment of the use of existing facilities and consider the re use of buildings etc It should be noted that the study area contains several sensitive and unique natural environments of national and in some cases international significance, which this work and enhance.

Scope of work

- 2.2 The work will involve the following:
- a) Review of relevant tourism literature covering strategic, planning and policy documentation as well as presenting baseline tourism data including visitor numbers.
 - b) Market assessment and preliminary market forecast for eco-tourism product in the study area. Preliminary assessment of any potential environmental and economic impacts and other benefits.
 - c) Overall spatial plan for the general zoning of facilities required by recreational and specialist nature tourists across the study area.
 - d) Detailed plan for the location of specific facilities (visitor attraction, eco-accommodation facilities, walking and cycling trails, etc.) within the context of the overall spatial plan
 - e) Sites appraisal and review of relevant planning and regeneration literature
 - f) Development of a number of the new ecotourism facilities to a stage at which they can be implemented, including specific individual site plans and architects'

drawings. Designs need to embrace and reflect the importance of sustainability and hence be eco-friendly and make a positive contribution to the conservation of the area and the environmental education of visitors. The destination will be marketed as an 'ecological destination' and hence this needs to be reflected and celebrated in all new visitor facilities. Particularly supportive of sustainability issues and building!

- g) Ecotourism Access Plan, setting out incorporating detailed plans for walking and cycling trails, accessible to all members of the community.
- h) Development of new tourism branding for the area which in turn will inform a detailed specification for the design and location of distinctive new signage and waymarking. This will require the consultant to liaise with Insite Environments and take account of the work they have already undertaken on the Millom Gateway project. As part of this design and feasibility work on the Gateway project, Insite have already developed schemes for specific "gateway" sites as well as proposing suggestions for signage, street furniture and branding.
- i) Guidance on planning, safety and environmental impact issues associated with the Ecotourism development
- j) Identification of barriers and risks to delivery and suggested action as to how these can be overcome or managed
- k) Costed action plan and timescales with critical path analysis for the delivery of identified capital schemes
- l) Proposed project management structure for capital schemes
- m) Development of business models for the new visitor attractions and facilities, including build costs, ongoing operational costs and an operational plan for each. This will identify ongoing revenue implications and analyse commercial viability including appraisal of existing and potential tourism product which could connect with a new centre
- n) Costed options for the ongoing management strategy for the future operation of the Ecotourism project, taking into account the environmentally sensitive nature of Much of the Ecotourism Development Area and its wildlife
- o) Comprehensive funding strategy related to the options set out in (k) above
- p) Detailed consultations with key stakeholders and potential partners

- q) A series of workshops involving the Millom and Haverigg Economic Regeneration Group and regular project Steering Group meetings
- r) Delivery of a conference/ consultation workshop event during the course of the project to engage the wider community of public and service providers.
- s) Production of visual boards/ models of ecotourism developments for use in conferences, exhibitions, consultation meetings with key stakeholders and for funding purposes.

2.3 In developing detailed proposals the consultant should give due consideration to the following over-arching aims:

- (a) **Marketing.** To use Millom's natural environment to strengthen its image, while taking account of environmental issues in the places, visiting times and messages that are promoted.
- (b) **Ecological gain.** To ensure that the area's natural landscapes, habitats and species benefit from the investment made in promoting and stimulating tourism activity.
- (c) **Development.** To ensure that tourism development is sympathetic to the environment, protects it and where possible, enhances it.
- (d) **Transport.** To increase the proportion of visitors coming to and exploring Millom and its surrounding area using public transport.
- (e) **Recreation.** To encourage recreational activity as a special way of exploring and experiencing the countryside without depending on a car.
- (f) **Local Economy.** To maximise the retention of visitor spending in the local economy through encouraging local enterprise and produce.
- (g) **Local Community.** To generate more awareness and participation by local communities in ecotourism.

- (h) **Visitor Management.** To be alert to the impact of visitors and traffic in sensitive locations and encourage proactive sound management.
- (i) **Visitor Awareness.** To stimulate greater visitor awareness and appreciation of the natural environment, historic and cultural heritage of the area and the potential impacts of visitor activities on this special environment.
- (j) **Tourism Enterprises.** To encourage and assist tourism enterprises and operators to adopt and benefit from environmental good practice.

2.4 In summary, the aim of the Study is to establish a general framework and suite of recommendations that will:

- deliver a first-class visitor experience;
- assist in stimulating economic regeneration South Copeland, with Millom and its hinterland as the hub
- increase visits to South Copeland, especially to Millom and its hinterland;
- be financially viable and sustainable;
- be environmentally viable and sustainable.

Project Governance

2.5 In view of the specialist nature of this piece of work and in order to ensure the buy-in of key partners at an early stage, a Project Steering Group has been established to oversee the development of the Study.

2.6 The project Steering Group will comprise representatives from the following organisations:

- Copeland Borough Council
- Cumbria County Council
- Duddon Estuary Partnership
- English Nature
- Cumbria Wildlife Trust

- Lake District National Park Authority
- Royal Society for the Protection of Birds
- Friends of the Lake District
- West Lake District Tourism Partnership
- Cumbria Tourist Board
- The Land Restoration Trust
- The National Trust.

2.7 The Project Steering Group will act on behalf of the Millom and Haverigg Economic Development Group to ensure the objectives of the study are achieved.

Section Three 3 - Key Documents

3.1 The consultant should ensure that in preparing the Study due regard is paid to the following key documents:

- The Regional Economic Strategy 2006. NWDA
- The Destination Management Plan for Cumbria 2006/07. Cumbria Tourism
- A Vision for the Lake District National Park 2006 – 2030. And How to Achieve It. Lake District National Park Partnership
- Natural Economy Steering Group Strategy, 2006
- Copeland Borough Council STEAM Report 2005
- Marketing the Natural Environment of the Northwest – Team. Feb 06
- Millom Health Check and Action Plan – Voluntary Action Cumbria, 2003
- Millom Operational Plan – BE Group, 2004
- Cumbria Joint Structure Plan
- Copeland Borough Council Local Plan 200- 2016
- The Duddon Estuary – The Duddon Estuary Partnership
- The Duddon Estuary – A Partnership for Progress – Technical Report, compiled by Rachel Bayliss with contributions from members of the Working Group, April 1994
- The Duddon Estuary – A Partnership for Progress – Issues Report, compiled by Rachel Bayliss with contributions from members of the Working Group, April 1994
- The Duddon Estuary – A Partnership for Progress – Report of Progress on Issues 1994-99, March 1999
- The Duddon Estuary – A Partnership for Progress – Strategy Review, March 1999
- The Duddon Estuary – A Partnership for Progress – Strategy Review, March 2000