

LONDON ROAD INDUSTRIAL ESTATE

Procurement of Development Consultancy Services – West
Berkshire Council

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INTRODUCTION

Carter Jonas is a national, multi-disciplinary chartered surveying practice operating from 33 offices nationally and employing approximately 450 full time professional staff; and total staff numbers of over 800. We are currently the 12th largest UK property consultancy by turnover according to Property Week's Agency League Table 2018 and the 6th largest privately owned property consultancy. We are a strong, robust business partner for our clients, with well-established teams that cover the production of development briefs (Development Consultancy and Agency teams), Masterplanning, Planning, development partner models, land assembly, relocation and advising on forms of contract.

We have built upon our heritage of working with landowners and private individuals and now act for clients across the public sector estate, commercial developers, institutional investors and funders and owner occupiers. This breadth of client base enables us to provide a rounded knowledge-base and understanding of the public, private and commercial property market.

Carter Jonas is well placed to assist West Berkshire Council and Partners to deliver a high quality development brief and masterplan for the development and regeneration of London Road Industrial Estate. Carter Jonas operates a hub office in Oxford with Planning, Development, Commercial and Masterplanning specialisms all operating out of Mayfield Road. The high level of activity within this office and our office in Newbury, brings considerable knowledge and experience in all relevant fields to aid the delivery of a full scale regeneration of London Road Industrial Estate.

Carter Jonas offer provides a combination of public sector developer procurement models, intimate knowledge of developers operating models and local market knowledge.

SECTION A1 – MANDATORY REQUIREMENTS

A1.1 Do you agree, without caveats or limitations, that in the event you are successful in this Further Competition, you will unreservedly sign the Terms and Conditions of Contract as set out at Appendix C upon award of the Contract?

Carter Jonas LLP confirms we will unreservedly sign the Terms & Conditions.

A1.2 Due to the confidential nature of data, knowledge and material that is likely to be encountered by the contractor and his staff as part of this Further Competition and any resulting contract. You are hereby required to sign the attached non-disclosure agreement set out in Appendix E. Failure to provide a signed copy of this with your bid will mean your submission is deemed non-compliant and not considered further.

Please see attached at Appendix 3

SECTION A2 – CONFLICTS OF INTEREST

A2.1 Please confirm whether you have any potential, actual or perceived conflicts of interest that may be relevant to this requirement.

Carter Jonas LLP confirm there are no conflicts of interest in relation to this requirement

A2.2 We require that any potential, actual or perceived conflicts of interest in respect of this mandate are identified in writing that companies outline what safeguards would be put in place to mitigate the risk of actual or perceived conflicts arising during the delivery of these services.

Carter Jonas complies with RICS guidance in relation to conflicts of interest. As an organisation we have an adopted Standard Operating Procedure (SOP) concerning this issue.

For each new instruction, a conflict check is run against the firm's instruction database to ensure no conflict in relation to the properties themselves and any related parties. Additionally, an email is sent to all partners and relevant associates within the firm to check that they are not aware of any potential conflicts.

Should a potential conflict of interest be identified, it would be declared to all the appropriate parties involved as soon as possible. We would offer to stand down from acting for any party to enable all parties to make an informed decision about how to proceed. If any party objects to us continuing to act, we will step away from the instruction.

Depending upon the facts in a particular situation, and if the parties make an informed decision that they want Carter Jonas to continue to act on their behalf, we ask for written confirmation from the relevant parties that they are happy for us to do so, provided that we are also comfortable in continuing to act.

As an organisation with national coverage of offices and clients, we are experienced in managing potential conflicts of interest and ensuring that there are robust processes in place, including the use of appropriate information barriers (Chinese Walls).

We note that the latest mandatory guidance from the RICS on this matter came into effect on 1st January 2018 and concerns guidance when an RICS member is acting on the open market sale or acquisition of a commercial investment real estate opportunity in the UK in order to avoid conflicts of interest prejudicial to their client's best interests. Whilst this currently only concerns investment market activities, additional reviews are taking place which we will shall continue to monitor.

- Accelerated delivery: Allied to the changing nature of developer procurement, and following the Letwin review, innovative ways are required to ensure that schemes are delivered at pace.
- Modern Methods of Construction (MMC): This delivery route is gaining significant momentum but its impact needs to be carefully evaluated to ensure that it will bring forward the savings, quality and acceleration that it potentially provides.

Risk management and mitigation

- Third Party Landowners: The importance and likely impact of third party landowners should not be underestimated. Thorough due diligence is required from the outset. Understanding those relationships will be a key task in the early stages.
- Technical Information: Having up to date and accurate technical site information is crucial to avoiding delays later in the process.
- Stakeholder Management: Understanding the objectives, and forming a close working relationship with the likes of the local planning authority, county council and LEP is a critical success factor. Our local knowledge will be important in dealing with this aspect.

Added Value

- Local market knowledge: We have consistently exceeded expectation based on our knowledge of local markets gained through deploying teams on the ground
- Use of senior staff: We have used experience personnel to deliver complex projects. This is imperative to gain the best results. We have matched this with more junior resource to achieve excellent value for money.
- Knowledge of developer market: Through our role managing disposals through sale sales to OJEU processes, we have built up a complex understanding of the developer/investor market and know and understand their approach to bidding, risk and appetite.
- Increased receipts: The overall added value to this work has seen increased capital receipts and the accelerated delivery of the Agency's main objectives to deliver housing stock at pace.
- Use of small & medium sized enterprises: Local housebuilders and other SMEs can provide local economic development and community benefits and broaden housing options over and above the national PLC's. Ensuring they are integrated into our thinking on developer selection is key.

1.2 Demonstration the ability to produce, with supporting evidence and examples, long term flexible masterplans in respect of mixed-use development and where such plans demonstrate the efficient use of developable land on sites of similar size.

Carter Jonas has been working in a number of locations with local authorities and other private and public sector partners to bring forward positive change and future investment. Further imagery and detail on several projects are included as part of Appendix 1 – Masterplanning Case Studies), but see below for a high level summary of relevant experience:

- **Cannock** – Delivery of a vision, development framework and prospectus for 18 urban sites in Cannock town centre. This is an ongoing project commission due for completion in July 2019 for which we are engaged as lead consultant for viability and socioeconomic advice through our Development Consultancy team, urban design strategy through our masterplanning team and Town Planning advice through our Planning team.
- **Great Yarmouth** – Production of a development vision for Great Yarmouth town centre on behalf of Great Yarmouth Borough Council, completed in April 2018. A holistic vision and framework was developed, followed by pin pointing of specific sites for which development briefs were prepared as draft Supplementary Planning Documents.
- **Nuneaton** – Delivery of a vision and development prospectus for Nuneaton town centre working closely with Nuneaton Town Council, completed in early 2018. The project involved a specific regeneration and repositioning study for the central parts of the town, considering public transport, public realm, a retail/ leisure strategy and employment/ residential uses at the heart of the town.

1.3 Demonstrate through examples the ability to manage sensitively and commercially, with supporting evidence and examples, the relocation of businesses out of a development area into appropriate new locations thus allowing development to proceed.

Due to the types of areas we work in it is often the case that industrial land close to a city/town centre is identified for redevelopment by the local planning authority and a CPO is often required to assist land assembly.

SME's within the light industrial industry are often uniquely placed and present the following challenges:

- They are often freehold owned and/or paying relatively modest rents. This can present a challenge in identifying suitable alternative premises;
- They are an extremely valuable source of local employment;
- They often occupy dated premises and can struggle to afford or justify new premises;
- They are often specialised businesses with premises fit for purpose. They can often include specialist machinery and equipment which can be difficult to relocate;
- The business activities are often unsociable (e.g. noisy) and therefore are not always suitable for all neighbourhoods;
- They often are located in proximity to similar businesses who share supply chains;
- Land requirements for SME Light Industrial space is often under pressure from other competing land uses such as residential development. Therefore site prices can be artificially inflated and expensive;
- Occupational tenures are not often documented

Our team have worked on a number of schemes requiring the acquisition of SME businesses including manufacturing, open storage, car repair workshops, commercial printers and scaffolders.

[illegible]

[illegible]

1.4 Demonstrate with examples experience of both managing and also monitoring a complex land assembly exercise involving owner occupiers on different lease terms and rental occupiers and where the land assembly cost needs to be transparent to ensure fair apportionment of future development proceeds between the land owner and development partners.

Client: Wycombe District Council, Princes Risborough Expansion

Carter Jonas is advising Wycombe District Council (WDC) on the proposed Princes Risborough Extension project which is due to provide 2,500 homes, two primary schools, other community infrastructure, and a relief road that is required to unlock the development and enable town centre improvements. WDC are considering the promotion of a Compulsory Purchase Order to support land assembly to ensure the proposed development can be provided in accordance with the new local plan which is due to be adopted in summer 2019. Our role includes the provision of a land acquisition strategy to support the acquisition programme, valuation advice and support through the CPO process.

The site includes a number of commercial owner-occupiers, development sites and residential interests on various tenures. The development is marginal in terms of viability and the Council are using Homes England grants to facilitate the delivery of enabling infrastructure. Therefore the costs of land assembly form a crucial part of the overall viability of the scheme and justification for the use of CPO powers. It is anticipated the Council will enter into one or more development agreements to deliver the residential elements of the scheme and again as a public authority they will need to demonstrate value for money for their own assets.

London Borough of Hounslow, Brentford High Street

We are currently advising the London Borough of Hounslow in respect of land assembly and CPO for land south of Brentford High Street. The development partner is leading on land acquisitions and has appointed its own property advisor. Carter Jonas was appointed to advise the Council on compulsory purchase and monitor the development partner land assembly. At our instigation, a schedule of negotiations to date was created and reviewed with the development partner's advisor. On the basis of the schedule we made recommendations as to bolstering contact and negotiations with a number of parties, to mitigate potential risks at inquiry. The recommendations were accepted and actioned and we reviewed the updated schedule subsequently with the development partner and their advisors following a further round of negotiations. The schedule will form an important part of the records for the CPO inquiry and has enabled the developer to fill in gaps in their engagement well in advance of the CPO being made.

The CPO has now been made and we are awaiting objections before reviewing them and advising the Council in respect of objection negotiations. We will also be providing support during the Public Inquiry process including Expert Witness.

1.5 Demonstrate with examples experience of advising landowners of different development partner models with corresponding levels of risk, e.g. full JV partnership with a single developer or a consortium of specialist partners delivering different elements of development.

Client: Hertfordshire County Council

We are experienced in working with Local Authorities in the procurement of Joint Venture Partners. We also work with our clients' financial and legal advisors and often act as lead consultant in directing their activities. For example, in early 2018, Morgan Sindall was named as the preferred development partner for Hertfordshire County Council following a strategic analysis, soft marketing testing and OJEU procurement procedure, completed by Carter Jonas together with 31ten Consulting and Sharpe Pritchard.

Hertfordshire County Council was seeking a long-term partner to work with it to fund and develop a series of sites from its portfolio, and potentially land from its partner Districts and the broader Hertfordshire Property Partnership. It was seeking a partner to help appraise the asset base, select sites and suggest the most appropriate development approach.

We worked with the Council's financial and legal advisors undertaking a detailed review of an initial 25 sites together with supporting strategic advice to determine which sites should be selected for the vehicle considering value, potential number of units, mix, location and planning status; providing property advice around timing, value, phasing etc.

Working with the Council, we identified four categories of site, as follows:

- An initial tranche of 12 sites
- A further portfolio of approximately 40 sites
- Two large urban extension sites (with the potential for 6,000 homes)
- A range of potential opportunities from partner districts and One Public Estate members.

A Stage 1 report was produced by the consultancy team reviewing the different delivery approaches for the Council, outlining the potential risk / reward profiles from disposal from an unconditional sale, through to self-delivery. Financial modelling was undertaken using the 12 initial sites that we had identified against these options. We also advised on potential procurement routes and the pros and cons of these.

In selecting a JV partner, the Council's objectives were to optimise capital returns, generate long term revenue streams, drive the pace of development and develop a quality brand.

Following approval from the Council on the Stage 1 report, we then moved forward with Soft Market Testing, speaking to our contacts in the market and engaging with them through a questionnaire and 15 face-to-face informal interviews.

These parties included housebuilders, investment partners, housing companies and developers. We also launched the opportunity at MIPIM.

The consultancy team then worked on the subsequent procurement of the development partner, via OJEU Competitive Dialogue process, in relation to 12 sites in the County. This involved close working with the Council's procurement team, progressing through SQ, ISDS and ISFT stages prior to selection. The consultancy team produced all documentation, responded to clarifications (managed by the Council's team via an online portal), led the dialogue sessions and undertook detailed evaluation prior to selection.

The financial bids received reflected timescales to develop out and sell the units across the 12 initial sites and the planning, funding and development assumptions were evaluated to ensure they were market facing, deliverable and met the requirements of the Council.

We continue to work with Hertfordshire County Council on various instructions including appraisal and Red Book valuation advice on the sites going into the Joint Venture from the Council's disposal pipeline.

[REDACTED]

1.6 Demonstrate with examples how best to manage an open book costings exercise to ensure development costs, as calculated by the land owner's development partner(s), is transparent and reasonable thus ensuring the land owner's net development proceeds are fair and reasonable.

[REDACTED]

Client:

Carter Jonas acquired around 90 acres of agricultural land in the Green Belt near Gloucester for an institutional client, being part of an 'area of search' within the then draft Regional Spatial Strategy. We then advised our client on methods of taking control of a second similar sized landownership in the area. Consideration was given to various methods including purchase, taking a promotion or option agreement, and entering into a landowner collaboration agreement.

In the end Carter Jonas negotiated a collaboration agreement with the adjoining landowner, before project managing the promotion of the overall site for our client. A draft allocation in the joint core strategy was secured and planning permission for a strategic mixed use development scheme including 1,500 new homes secured in 2016 following a 'call in' public inquiry the previous year. The allocation was subsequently confirmed on the adoption of the joint core strategy in December 2017.

Carter Jonas have since been project managing the discharge of planning conditions and the delivery of primary infrastructure to open up the site for housing. We have now sold three individual residential phases with capacity for 635 new homes to national house builders. During this commission Carter Jonas have also negotiated and settled 'overages' due to former landowners, the surrender of easements affecting the site and resolved many other issues to enable delivery.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] in the

1.8 Demonstrate with examples experience of working with local authorities' specific to major regeneration projects and knowledge of their procedures and governance.

Making great places from scratch can be challenging. Bringing about effective urban regeneration of existing places can be more complicated. A masterplan needs to be right in terms of its physical context and its land use. It needs to be viable and deliverable and needs to be grounded by a sound understanding of the needs of the area and the desires of those living within it.

Great Yarmouth, Norfolk

One recent example of our work is Great Yarmouth in Norfolk. Great Yarmouth was a large and important town in mediaeval times and still retains the largest ancient marketplace in the UK. However like many former fishing ports and seaside towns, in recent decades it has faced severe economic challenges. Carter Jonas' masterplanners and town centre team were appointed to undertake a comprehensive 4-year regeneration plan for the whole town centre from the River Yare in the west to the seafront in the east, and from the station and Minster in the north to the St. George's Cultural Quarter in the south. The study produced an integrated physical and economic renewal plan with a series of projects: new station and highway gateways; new links through to the town centre; a rethought marketplace; environmental improvements to the public realm; and development briefs for key sites. Particular emphasis was placed on attracting new visitors to the town centre to help renew the economy, as well as renovate the town's superb stock of historic buildings. A comprehensive public consultation strategy was undertaken to secure local support for the proposals.

Sudbury, Suffolk

Another example of recent work is in Sudbury in Suffolk. Sudbury is an attractive market town with many fine buildings including Gainsborough's House and the Grade 1 former St. Peter's Church dominating the marketplace. The Hamilton Road Quarter is a slightly run-down area behind the town centre, with a small bus station at its centre as well as an important route to the railway station and local food stores. We were appointed by Babergh and Mid Suffolk District Council, who have considerable land ownerships in the Quarter, to draw up options for its regeneration with particular emphasis on improving the evening economy for younger people. The preferred option enhances an existing retail mall and grafts a small urban square on to its southern end. This will provide an anchor for a 5-screen cinema, food & drink outlets, small-scale shops and housing overlooking the mediaeval church tower. The quality of the public realm running through the Quarter is as important as the buildings which enclose it, and includes well-landscaped car parks and a fine old walled garden.

Nuneaton, Warwickshire

A further example of regeneration experience is our appointment by Warwickshire County Council and Nuneaton & Bedworth Council. Nuneaton is an attractive market town which is highly accessible by all transport modes, but most especially by rail. It also benefits from having a number of large development opportunity sites in the town centre which could significantly improve its potential to create a vibrant mixed-use place attractive to a younger market. We were appointed to prepare an Initial Development Prospectus for presentation to developers at MIPIM, and subsequently to prepare more detailed development Briefs for the most important regeneration opportunities within the Ring Road.

More recently, we have been appointed by Cambridge City Council to prepare a regeneration-based masterplan for the East Barnwell area of the city. This area comprises a large part of the city including residential, employment, green space and community facilities. Our client secured significant funding from the government's One Public Estate Program and subsequently appointed Carter Jonas following an open tender process to review development potential

across the area with a brief to complete an area-wide masterplan for the delivery of 400+ new homes, new community facilities and infrastructure, as well as inward investment for this part of Cambridge.

Working with Public Sector Bodies

Our combined professional teams have considerable knowledge and experience in local government procedures and governance, especially in relation to preparing development briefs, Supplementary Planning Documents, masterplans and development prospectus. The documents listed here and prepared for various councils within England required extensive and close working with local authority planners, property teams, the highways authority, council members and others to help realise potential opportunities and to bring strategies to fruition. Our team includes professionals who have worked at a senior level in local government for many years and fully understand development and planning procedures as well as approval requirements and the need to work effectively with county and district authorities as well as utility companies and other public bodies and interest groups

SECTION B2 – SERVICE DELIVERY & APPROACH

2.1 Describe the overall service you believe that the Council should be seeking.

West Berkshire Council will require an experienced team that provides a holistic approach to each of the 4 stages outlined in the service description, but crucially the consultant will need to:

- **Demonstrate local market knowledge of the area.** Included in the overall project team is Nick White, a Partner based in our Newbury office, who has extensive experience in the local area, and whose clients have included West Berkshire Council.
- **Have a complex understanding of public sector procurement.** Carter Jonas has extensive experience of running developer selection processes on behalf of both the public and private sector. Our experience ranges from OJEU-compliant competitive dialogue processes through to straightforward land sales with overage / clawback provisions, as well as advising on the development and procurement of partners on major mixed use development sites, science parks and options appraisals.
- **Knowledge of likely partners bidding models and propositions.** The experience outlined in Section B1 has provided our team with an excellent understanding of what makes for a successful process. This includes the level of granular data that potential bidders will require in order to progress a submission, the operating models of potential bidders, and significant experience in the analysis and interrogation of bid proposals, including the data and evidence which they provide – market research, development appraisals and cash-flows.
- **The ability to deliver all services in house.** A consultant that can deliver most if not all of the services in house will be at an advantage in terms of delivery, quality of work and client relationships

A primary consideration for a development partner will be the proposed structure of an agreement with the council whether it be a simple option/development (i.e. contractual) agreements or a corporate joint venture (generally LP or LLP vehicles). Determining factors will be the nature of the scheme, its complexity and scale, the conditionality, the nature of the developer and source of funds, the risks associated with delivery of the project, and the relative positions of the parties to the agreement on risk and reward. How this agreement deals with primary obligations (planning, infrastructure, design, funding and finance, governance /approval processes), areas of risk transfer, and milestones to be imposed on the developer will be key along with the profit share mechanism. We would support the council in mitigating risk, maximising returns and delivering as much certainty as possible about the form and quality of development, with known milestones for delivery.

2.2 Describe your method & approach to urban regeneration.

Approach

Making great places from scratch can be challenging. Bringing about effective urban regeneration of existing places can be more complicated. A masterplan needs to be right in terms of its physical context and its land use. It needs to be viable and deliverable and needs to be grounded by a sound understanding of the needs of the area and the desires of those living and working within it.

Carter Jonas' Masterplanning team has a range of regeneration experience across England, having developed masterplans to promote site redevelopment to support a step change in the health and vitality of a number of towns. The team works out of both our London and Oxford offices and has both local knowledge and national reach. The approach to our work provides our clients with a comprehensive service that produces attractive environments that are viable, sustainable and deliverable, as well as responsive to their context. Working in a property company, we have ready access to development advice which helps ensure our proposals are grounded in the reality of local market conditions. We work closely with our public sector clients and ensure every project is tailored to the needs of the community we work in. We have undertaken several regeneration strategies for local government including at Sudbury, Cannock, Nuneaton, Bedford and Great Yarmouth (As outlined in Section 1.8 of this tender response). Case Studies are provided in the appendix.

Great Yarmouth – Example of Placemaking

In the example of Great Yarmouth, the town was significant in mediaeval times and still retains the largest ancient marketplace in the UK. However, like many former fishing ports and seaside towns, it has faced severe economic

challenges. Carter Jonas' masterplanners were appointed to undertake a comprehensive 4-year regeneration plan to deliver a masterplan to identify opportunities and manage change for the whole town centre. Projects including new station and highway gateways, new links through to the town centre, a new format for the marketplace, environmental improvements to the public realm, and development briefs for key sites were identified in the masterplan. A comprehensive public consultation strategy was also undertaken to secure local support for the proposals. The masterplan was approved by the Council in 2017 and the above projects are now being delivered, realising positive change on the ground.

Ridgeons, Cambridge – Example of Placemaking

The approach taken by Carter Jonas to the relocation and redevelopment of the Ridgeons site on Cromwell Road in Cambridge explains how our carefully considered and coordinated approach can unlock sites and deliver quality spaces that will be of benefit to the wider community. At the outset of that project, significant fears existed within the local community in relation to the scale of any redevelopment. Through an extensive and wide ranging consultation exercise, which included the preparation of an SPD, those fears were transformed into productive dialogue focused on the potential benefits of redevelopment. Gathering a clear understanding of the concerns that stemmed from earlier developments, the infrastructure needs of the area and the development plans of stakeholders enabled a masterplan to be delivered which provides new housing, centred on a large area of much needed useable open space, through which the Chisholm Trail cycle and pedestrian route can pass together with community rooms and an early years nursery. A commercial site within a residential area has now been relocated to a more suitable site and permissions have been secured to deliver a high quality redevelopment which will complete the regeneration of this once industrial part of Cambridge.

Infrastructure

Improving infrastructure is a key part of most of our planning and property projects. Whether it be delivering enhancements to public transport facilities, delivering new uses such as community spaces, education provision or health care facilities, new open space, allotments or planting areas, our approach is focused on identifying the needs that exist and means by which they can be addressed through development. Understanding what issues exist locally is key to this but also our integrated approach to assessing commercial need and viability helps ensure physical improvements that can be delivered. Evidence of Carter Jonas assisting with the delivery of improved infrastructure includes new cycle and pedestrian routes at sites including Brunswick Riverside, Cromwell Road and the Crest Nicholson site adjacent to the busway, new open spaces and the delivery of community rooms and spaces across the City of Cambridge. In Great Yarmouth, ideas proposed within the town centre masterplan are now being delivered on site, including the refurbishment of The Conge connecting the rail station and marketplace.

Land Assembly

Land assembly often forms the start of many of the projects we deal with. We have an experienced team who have worked on many such sites but local examples would include working with an Oxfordshire Parish Council to negotiate the acquisition of third party long leasehold interests to enable redevelopment of a site to include the provision of a new for purpose parish centre, health centre and commercial development, the latter, the generate an income stream.

Carter Jonas was appointed by Buckinghamshire County Council to negotiate the terms of a Landowner (Collaboration) Agreement between our client and two other parties and to offer the whole site to the market with the benefit of an outline planning consent for up to 250 dwellings, secured via a promotion agreement. Winslow is an important strategic growth location in Buckinghamshire and is located on the route of the planned east– west rail line connecting Oxford with Cambridge. The Collaboration Agreement made provision for the equalisation of the sale price and also secured rights of access to our client's retained land (to facilitate additional planned development). On completion of the Agreement, Carter Jonas was jointly instructed to bring the opportunity to the market and secured a successful sale to Bloor Homes as a result of a competitive tendering process.

2.3 Demonstrate your ability to provide the service in-house with the necessary skills across the categories of development brief, master planning, development partner models, land assembly & relocation and advising on forms of contract. Please provide any details of services you may have to out-source.

Carter Jonas will act as lead consultant. As shown in the organisational chart in section B3, we have chosen to use sub-consultants for one discipline. While we can deliver all the services required internally, we have elected to enhance our offer in areas where we feel greater depth of resource is required to meet the requirements of the scope on a national basis.

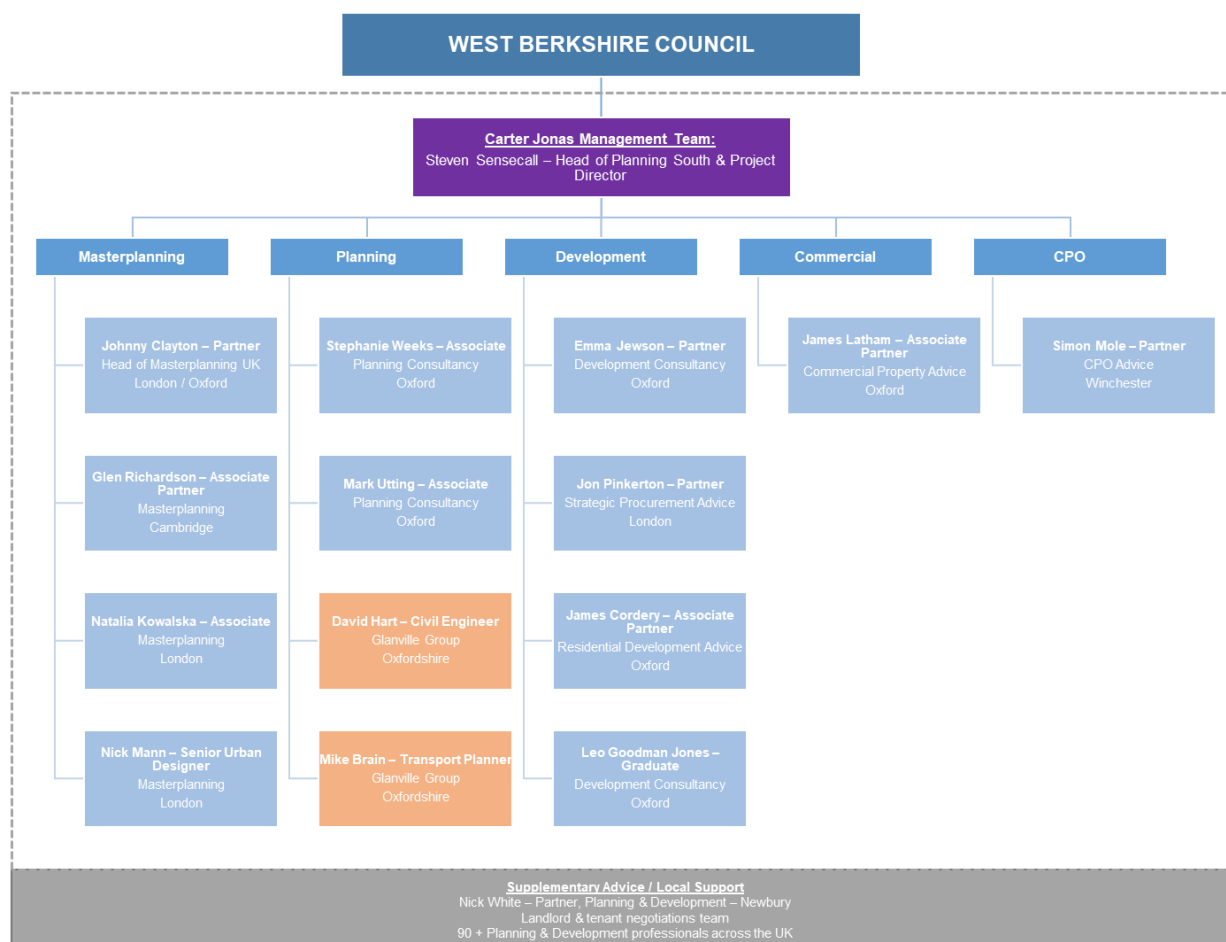
Our nominated Lead Partner will take overall responsibility for those areas of the contract which are delivered by sub-consultants to ensure that the same standards are adopted uniformly, regardless of whether they are provided by us or our nominated sub-consultants.

We have robust procedures for sharing and managing information based on adopting standard process and our technology platform. We only select sub-consultants who have a similar track record in delivering to the public sector as ourselves, and organisations where we have worked previously worked together or have a long term relationship.

The single element of this brief we will have to sub-consult will be to provide advice around transport planning. This will be provided by the Glanville Group, based in Didcot, Oxfordshire.

SECTION B3 – STAFF & OTHER RESOURCES

3.1 Provide the team structure proposed to deliver this service to WBC.



3.2 Relevant experience of each team member

Steven Sensecall will be supported in the delivery of the core tasks by Emma Jewson. Emma is a Partner based in our Oxford office and will focus on the Strategic Development advice that will feed into the development brief element of the appointment, with James Cordery leading on the day to day development advice, and with support from Graduate, Leo Goodman-Jones. Emma will also be working on providing viability advice.

James Latham has in depth understanding of sites with similar requirements, as evidenced by his CV. James Latham will provide advice around the commercial property advice element of the project with James Cordery advising on the residential part. This advice will feed into the overall development brief as well as providing ad hoc advice through the lifetime of the project.

Amongst other projects, the team has been involved in the North Brockworth project and in advising private clients elsewhere in Tewkesbury Borough in the promotion and successful sale of two development sites (289 units and 68 units respectively) with a planning application currently submitted for a site for around 500 units

The conceptual masterplan will be provided by our in house team of experienced masterplanners.

Johnny Clayton joined Carter Jonas in July 2018 to head up the Masterplanning and Urban Design practice across the UK. Johnny is a Masterplanner and Urban Designer, with a broad skills base and over 18 years of project experience, through which he has undertaken extensive urban regeneration work. Johnny has led a number of high profile

masterplans including Spitalfields in Birmingham, part of the Birmingham Big City Plan, and Cannock Town Centre regeneration strategy which culminated with a market-facing Development Prospectus.

Our wider masterplanning team includes Glen Richardson, Natalia Kowalska and Nick Mann. Prior to joining Carter Jonas, Glen headed up the Urban Design team at Cambridge City Council where he spent 20 years delivering major regeneration projects in Cambridge, including Trumpington Meadows and Cambridge Southern Fringe. Natalia is the longest serving member of the team having joined in 2013. She has worked on town centre projects including Great Yarmouth, Nuneaton and Sudbury. Nick Mann assisted Johnny in the delivery of the Cannock Prospectus, completed in October 2018.

The masterplanning team are currently retained by Cambridge City Council to deliver a Strategic Masterplan for the East Barnwell district of the city, which is a phased programme through to August 2020 to deliver a series of similar services and outputs to the Newbury Project.

Jon Pinkerton is head of the London Development team at Carter Jonas. He was formerly head of Public Sector at GL Hearn.

Jon provides development consultancy and strategic property advice to local authority, public bodies and private sector clients. He has advised on a wide range of projects including town centre developments, regeneration schemes, masterplans, option feasibility studies and estates strategies. He specialises in the structuring of delivery strategies and the procurement of development partners for major regeneration projects, and as such will be a specialist developer procurement advisor, working with Emma to feed into the wider development brief.

Our CPO team provide expert CPO advice as required across the entire CPO process from selection of powers, pre-CPO engagement and negotiations, through CPO preparation, justification and inquiry, preparation and implementation of notices, taking of land, negotiation of compensation and where necessary ADR and litigation at the Upper Tribunal. This would be led by partner Simon Mole.

Simon has significant experience in all aspects of major land assembly schemes including formulation, referencing, production of CPO documents, objection management, implementation of powers and negotiating purchases. He is a member of both the Compulsory Purchase Association and the National Infrastructure Planning Association. He is also a RICS Registered Valuer.

Planning services for this instruction will be led by by Stephanie Weeks and Mark Utting. Both have extensive experience in the provision of planning consultancy services, working both within consultancies and local authorities.

Supporting the overall delivery of the project is Partner, Nick White. Nick is a member of the Southern Planning and Development team and is based in our Newbury office. He has over forty years' experience in advising and marketing residential and mixed use development opportunities in Newbury and surrounding area.

He undertakes instructions solely for landowners and recent clients have included West Berkshire Council, Wiltshire Council, plus Trusts together with many private and corporate companies. Local land sales have included five dwellings on the edge of a village - up to 1500 units on a subject to planning basis at Newbury Racecourse.

Nick's recent work in Newbury area has included;

Land at Pound Lane Newbury

A three acre former Depot owned by West Berkshire Council. An instruction secured by a competitive tender process. We provided marketing and valuation advice prior to taking the property to the open market seeking unconditional or subject to planning offers. The site had historic contamination due to part used as a municipal tip and there were issues with ground stability. We managed the negotiation process of very detailed cost engineering between the purchaser and our client to mitigate the potential significant land price reduction, to the satisfaction of both parties.

Land at the Ridge, Cold Ash, Near Newbury

Acting on behalf of Trustees and third party landowner we provided marketing and valuation advice. This included recommending the most appropriate type and scale of development to maximise value and the negotiation of off- site financial contributions for affordable housing. We coordinated the involvement of planning and other relevant consultants to secure a planning permission which was subsequently brought to the open market.

A supplementary team but none the less may be useful in providing expertise around landlord and tenant negotiations is our in house team. With considerable market knowledge our landlord and tenant advisory teams represents the interests of tenants and landlords on negotiating lease terms, expiries, rent reviews, break options and relocations.

We have dedicated office, industrial, retail and leisure sector teams as well as being a leading specialist in the UK science park sector. In addition we provide related consultancy services covering:- dilapidations liability assessment, negotiation and project management; HM Revenue & Customs Capital Allowances / fitting out works cost tax relief advice; business rates analysis and appeal / reduction services; service charge audit / reduction services; fitting out works contractor procurement and project management.

In depth detail on all team members can be found in Appendix 2 – CVs.

3.3 Demonstrate experience of managing multiple stakeholders.

We are used to working with a variety of different stakeholder groups from our appointment on other similar projects. This includes a wide range of stakeholders, both internal and external. Within a local authority environment we are used to working with both officers and members, as well as across the wider public sector. This can include working across County Councils and Boroughs / Districts in two tier authorities. We are also very experienced in working with third party stakeholders such as funding providers like Highways England or the Public Works Loan Board who want to be kept informed of progress as projects develop.

Our approach is to understand which stakeholders need to be kept informed prior to the contract commencing. They will be identified during the mobilisation phase, working with West Berkshire Council's team. Once that is understood we will integrate stakeholder management within our project plan, which will include the method and frequency of contact. It will be the responsibility of our Project Director to ensure that all stakeholders are kept up to date throughout the contract.

Our engagement plan depends on the nature of the work we are instructed to deliver, but typically includes the following forms of communication:

- An inception meeting with stakeholders during the mobilisation process to understand their specific requirements as part of the overall project delivery
- Frequent project delivery meetings to which stakeholders may be invited if appropriate.
- Written reports on progress including a project programme setting out all key tasks and milestones.
- On complex multi-disciplinary projects we may develop an online dashboard reporting system to record progress against the programme, report on Key Performance Indicators, and provide a document store. Read only access can be provided to Stakeholders in a secure password protected environment.

We recognise the importance of protecting our clients from reputation risk. This means that all engagement with stakeholders must be clear and transparent at all times, with communication frequent and able to be understood by a non-property audience.

We also understand that on some occasions stakeholder interests may compete with the customer's own objectives. Should this arise we will utilise a clear communication process to ensure that all parties are provided with all the information that they need to progress matters so that projects do not become delayed.

We are used to dealing with external parties raising questions such as Freedom of Information Act requests or Parliamentary Questions. As a result we understand the importance of answering these questions promptly and without ambiguity.

SECTION B4 – MANAGEMENT & COMMUNICATION

4.1 Project Director and single point of contact and relevant experience.

For all contracts of this nature, we used a tried and trusted account management methodology based on our ISO9001 accreditation. Each contract is structured under a Lead Partner who will take responsibility of the overall delivery of the project. In this role we have selected Steven Sensecall

Steven is Head of Carter Jonas' Southern Planning team and leads a team of planning professionals working for a wide variety of public and private sector clients for whom the firm provides planning consultancy services on a national basis.

He appears regularly at Planning Inquiries and Development Plan Examinations in Public as both an advocate and expert witness. His experience includes advising a number of public sector organisations on strategic land matters such as DIO, UKAEA, LB Harrow and Medway Council. Due to his seniority within the business, he would act as an ideal Project director and single point of contact

For more in depth relevant experience, please refer to Steven's CV in Appendix 2.

4.2 Evidence of proposed team of having worked together before on similar regeneration projects.

We are a national business operating from 33 offices located across the UK. This provides excellent reach and local market knowledge across a wide geography, often in locations which are poorly served by other large national firms. All our regional offices are multi-disciplinary providing all of the core services required for the London Road Industrial Estate brief. As a result, our clients are provided with qualified subject experts who are also knowledgeable about their region and its local context, as well as having close inter-office links. This allows for collaboration on major regeneration projects across the UK, with most if not all of our project team working on similar projects together. These projects are outlined in Section B1.

Our London HQ office undertakes projects across the wider South East area as well as in London itself but overall, approximately, 80% of our total resources however are based outside of London and in the regions.

For each individual commission, we would identify the resources required to deliver that instruction to meet the client's need at the outset. This will include the level/grade and number of Full Time Equivalent staff to ensure value for money, while delivering client expectations. Wherever possible we will use locally based staff to deliver instructions. This provides the local market knowledge required which we consider is a critical success factor to achieving desired outcomes. It also means that staff can be deployed quickly on site for time sensitive instructions, reduces the need for utilising sub-consultants and also reduces travel time, cost, and environmental footprint.

When managing peaks in demand or when additional or specialist resource is required to meet the requirements of the instruction, we would bring in staff from other offices (including the nominated sub-consultants) within the region. This provides the critical mass required to deliver larger projects or deal with short timescales. All our offices are configured to run off the same technology systems, meaning that any of our staff can visit another office and access files via shared drives, pick up emails or voicemails and access the company intranet. Local market knowledge is captured via our in-house product, Agency Pilot. This allows us to build a record of transactional evidence at local market level. This is supplemented by external data sources to which we subscribe including CoStar, IPD, Experian and Molior.

The scope of service for this project is diverse and multi-disciplinary. Effective delivery of an integrated service will only be achieved through effective communication both within the internal team and with the client. This is an area that we are vastly experienced in through the successful delivery of other contracts and frameworks.

The chart in Section B3 set out how we would structure our delivery team. We have allocated overall responsibility for this contract to Steven Sensecall. He will be assisted by discipline leaders for each of the specific core services. This overall group will be responsible for performance on the project over its duration.

Communication

Carter Jonas is organised into four divisions. These divisions are used to working closely with one another, and in our regional offices, staff are co-located to ease communication.

Due to the large number of instructions jointly managed across our divisions, we hold regular conference calls/meetings to review existing and potential new instructions on a national basis. This has the benefit of ensuring that a wider staff team is appraised of the work we are undertaking, such that if further or new resource input is required, those members of staff are already familiar with the project beyond the core delivery team. It also helps to share best practice and highlight any potential conflict situations. We also share information effectively on a national basis via our intranet site, The Loop. All staff members have access to the Loop which provides a link to comparable data, Standard Operating Procedures and reporting templates and links to the external data sources to which we subscribe such as Costar, Moliar and IPD.

4.3 Demonstrate effective client progress reports and development of client strategies.

As outlined above, we would nominate a Partner to take ownership for the overall delivery. That Partner would be responsible for co-ordinating the input of all the disciplines involved in project delivery and take the lead on client progress reporting. At the commencement of the project we would set out a clear reporting structure, highlighting milestones which would be communicated to the delivery team.

The format and nature of reporting would be agreed on a case-by-case basis to suit the needs of the client. Where the client team and delivery team are large, it may be expedient for the individual workstream team to liaise directly with counterparts at the client to ease communication. On large and more complex projects, we would seek to use a secure extranet site. This would provide a mechanism for the both the client and lead partner to review progress against individual tasks, and for the project as a whole. It would also act as a data room for reports, legal documentation and contact details for ease of communication.

Carter Jonas could also utilise a live dashboard reporting output that displays all KPI scoring plus contract financials and individual job updates. This dashboard can be filtered by Project Contract Officer/Authorising Contract Officer and CJ Surveyor. We also have the ability to add mapping technology with a geospatial display function which can be discussed if required during mobilisation.

Under our ISO9001 Quality Management System, we have committed to undertaking steps to ensure that continuous improvement is built into our processes. In practice, this means reviewing how we have performed on contracts. This may be reflected in reaching agreed Key Performance Indicators, and can also be recorded via post-project feedback from customers and stakeholders. We regularly use feedback from customers to understand how we can improve. This includes online surveys through to in-depth interviews undertaken by independent third parties. The results are then communicated back to the relevant Lead Partners and the Business Development team to take on any key learning points. Where opportunities for improvement are identified, they are passed to our Training and Development team to action at either individual or team level

4.4 Ease of understanding information submitted via this tender.

The information outlined within this tender has been well written and easy to comprehend. Any questions the project team might have can be put forward in our initial inception/mobilisation meeting with West Berkshire Council.

SECTION B5 – PROGRAMME

5.1 Ability to start as soon as contracts are completed.

After evaluating the brief issued, Carter Jonas LLP confirms that we can meet all project timescales, milestones and project outcomes within the necessary timeframes. To help illustrate this we have mapped out in our 5.2 response an indicative timetable of key milestone and actions which sees the final report issued in April/May 2020.

5.2 Demonstrate the ability to deliver the Development Brief and Masterplan by end of April 2020.

To deliver the London Road masterplan, we will ensure that the stages of work clearly match the required deliverables. This applies especially to the stakeholder constraints and expectations identified at the Call for Sites stage, where the input and evidence produced feeds directly into area wide and site specific solutions for land use, design and viability. Key to our approach is interpreting a range of inputs, data and views from a wide variety of parties to create a flexible, robust and deliverable strategy across the entire study area. As an experienced property consultant, we can provide integrated and deliverable solutions capturing planning, masterplanning, CPO and development requirements in one. Given our in house expertise and range of services it is unnecessary for us to consult in other businesses for a project such as this.

Below we have mapped out four key tasks of the project programme in order to deliver the various requirements of the “Stage 1” project brief contained within the tender documentation.

Ref.	Item	Programme (Weeks)	Stage Header
5.2.1.1	Review of documentation	Stage 1 (2 weeks)	Project scoping and review of background evidence
5.2.1.2	Review site constraints from Call for Sites		
5.2.1.3	Lease Review		
5.2.1.4	Development Brief and Masterplan (stakeholder engagement)	Stage 2 (6 weeks)	Development Brief, Masterplan Options and Testing
5.2.1.5	Viability, options testing and returns		
5.2.1.6	Masterplan delivery, community benefits, improved economy of LRIE, sustainability		
5.2.1.7	Local Plan testing	Stage 3 (3 weeks)	Potential Delivery Mechanisms
5.2.1.8	Delivery Mechanisms (Consultancy Advice)		
5.2.1.9	Relocation of facilities		
5.2.1.10	Final Reporting	Stage 4 (3 weeks)	Final Reporting
		14 weeks	

Stage 1 - Project scoping and review of background evidence

We would undertake a review of all available evidence based documents and current planning policy to provide us with a thorough understanding of existing land uses and needs within the area. A strategic planning history review would also be undertaken to identify any significant development projects planned, or consented, in the immediate area. Site opportunities and constraints would also be identified and mapped.

Stage 2 - Development Brief, Masterplan Options and Testing

Carter Jonas' Planning Team would undertake a more detailed appraisal of the identified study area and surroundings. This information, along with viability input, would then inform the development of high level capacity studies and concept development options for the LRIE area prepared by the Carter Jonas' Masterplanning Team.

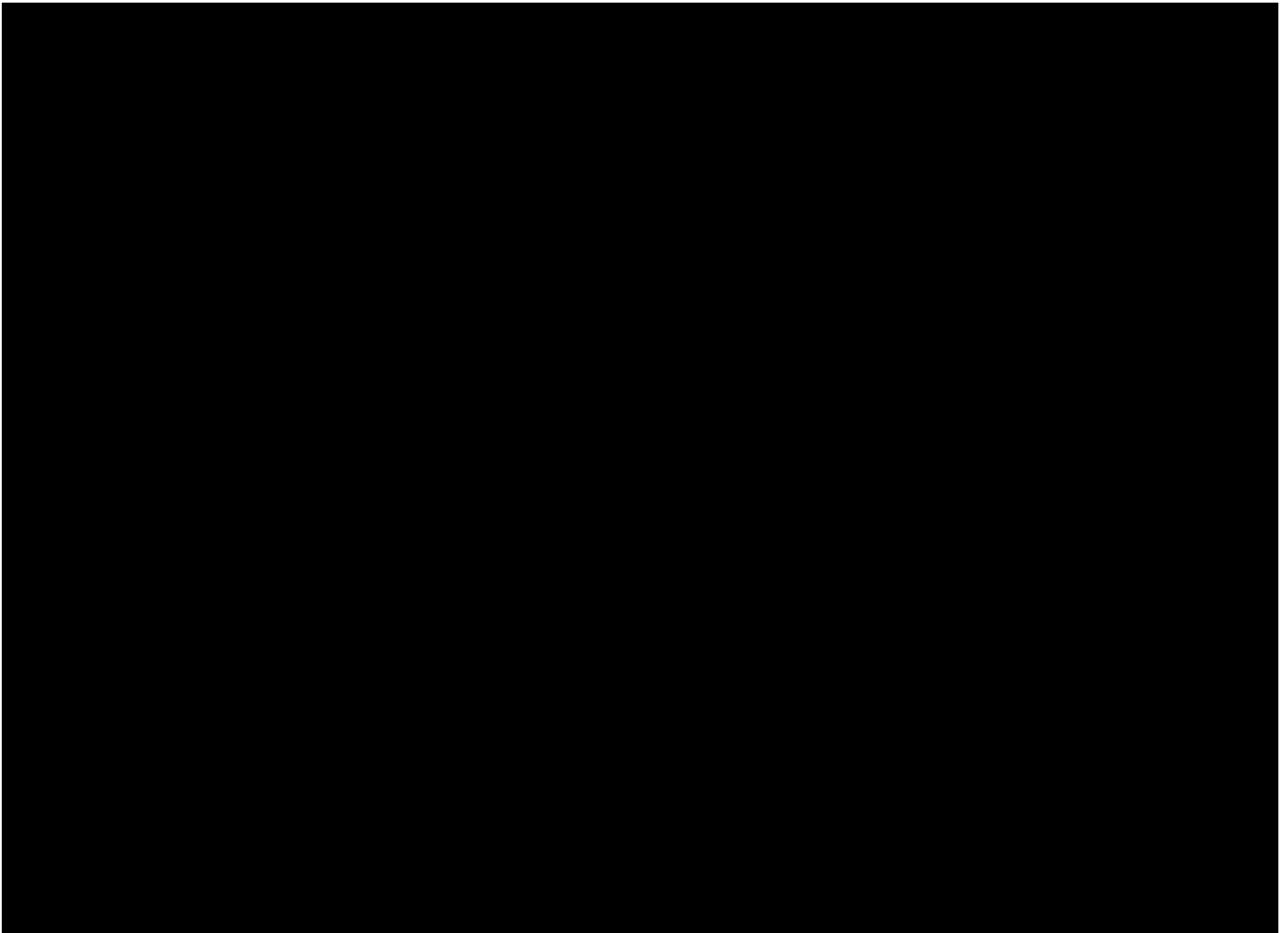
Stage 3 - Potential Delivery Mechanisms

The viability and deliverability of different delivery models will then be tested and reported within a recommended delivery strategy in order to maximise receipts and land value for the council.

Stage 4 - Final Reporting

We will provide a draft and final report for the client team by the required date. The format of the final document will be provided in digital pdf file(s). The format of the final report will be agreed but at this stage we envisage it could comprise a summary masterplan document and appendices including more site specific information and background studies (planning analysis, high level appraisals).

SECTION B6 – PRICE



APPENDIX 1: MASTERPLANNING CASE STUDIES

CASE STUDY



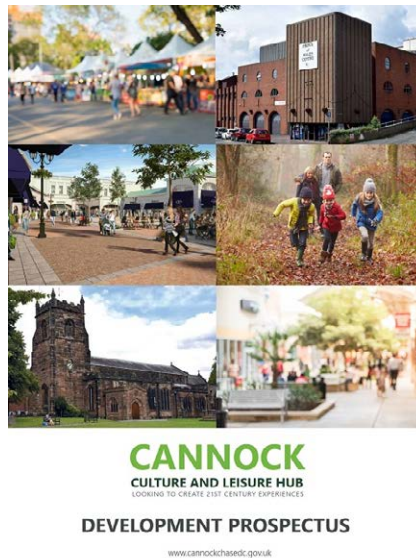
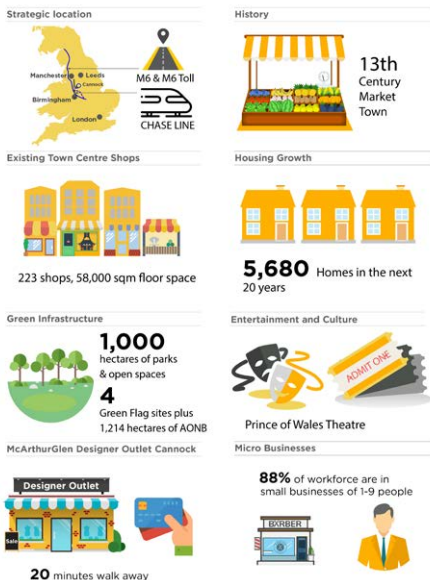
CANNOCK TOWN CENTRE FRAMEWORK

Job name:
Cannock Town Centre

Location:
Cannock, Staffordshire

Client:
Cannock Chase Council

Date of completion:
October 2019



2

Carter Jonas masterplanning, planning and development teams were jointly appointed in late 2018 by Cannock Chase Council to undertake a six month study in order to produce an urban regeneration framework and a market facing development prospectus for Cannock town centre.

Working in close collaboration with Cannock Chase Council and their town centre partners, the study involved five key phases of work: Site Analysis, Evaluation of findings, Design, Consultation and Reporting. The completed town centre framework forms the basis

3

for the future regeneration projects, whilst the prospectus enables the council to actively engage with prospective investors and developers as it seeks joint venture partners for some sites and to dispose of other sites for development.

The combination of our design, planning and viability skills has enabled the team to create a series of development briefs for 12 sites which are planning conscious whilst being commercially savvy.

1. DEVELOPMENT FRAMEWORK
2. TOWN CENTRE INFOGRAPHIC
3. DEVELOPMENT PROSPECTUS

Carter Jonas

CASE STUDY

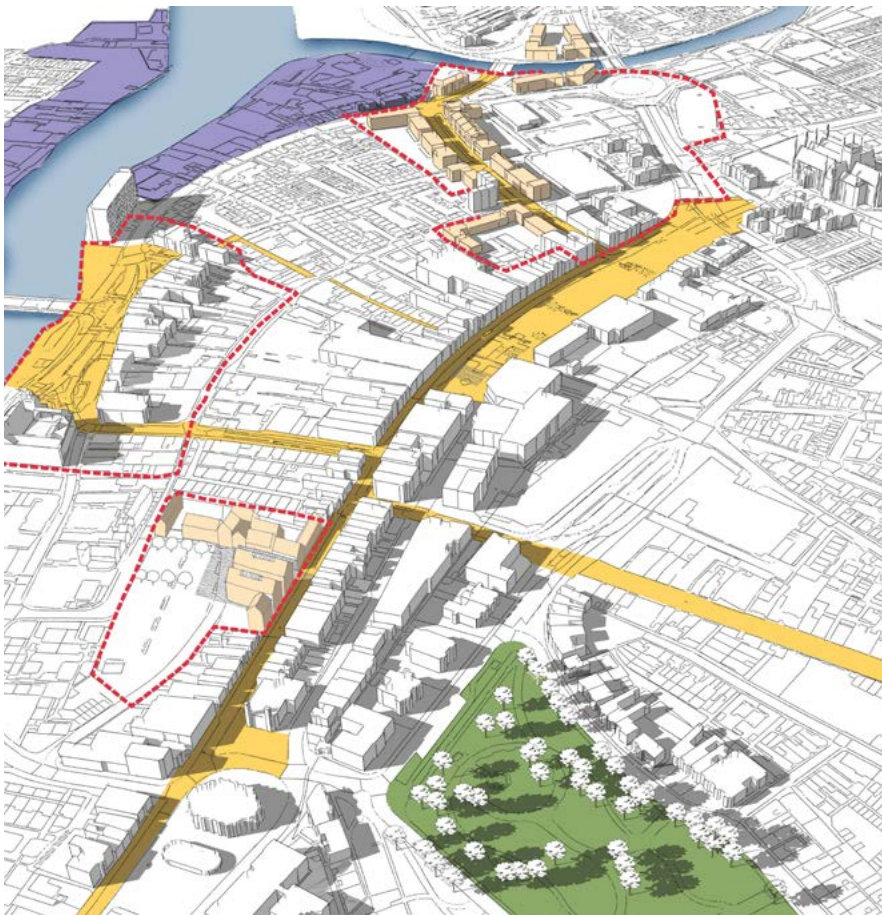
GREAT YARMOUTH TOWN CENTRE MASTERPLAN

Job name:
Town Centre Masterplan

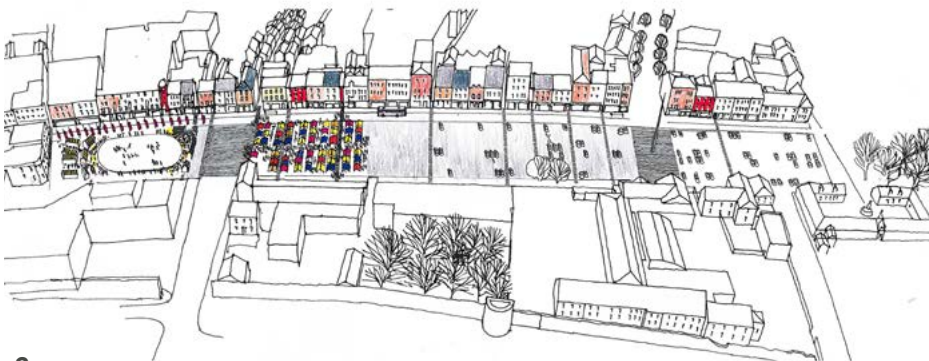
Location:
Great Yarmouth

Client:
Great Yarmouth Borough Council

Date of completion:
ongoing



1



2

Great Yarmouth was a large and important town in mediaeval times and still retains the largest ancient marketplace in the UK. However like many former fishing ports and seaside towns, in recent decades it has faced severe economic challenges.

Carter Jonas' masterplanners and town centre team were appointed to undertake a comprehensive 4-year regeneration plan for the whole town centre from the River Yare in the west to the seafront in the east, and from the station and Minster in the north to the St. George's Cultural Quarter in the south.

The study produced an integrated physical and economic renewal plan with a series of projects:

- New station and highway gateways
- New links through to the town centre
- A rethought marketplace
- Environmental improvements to the public realm
- Development briefs for key sites

Particular emphasis was placed on attracting new visitors to the town centre to help renew the economy, as well as renovate the town's superb stock of historic buildings. A comprehensive public consultation strategy was undertaken to secure local support for the proposals.

1. ACTION AREAS
2. MARKET PLACE SKETCH

Carter Jonas

CASE STUDY



1

NUNEATON TOWN CENTRE REGENERATION

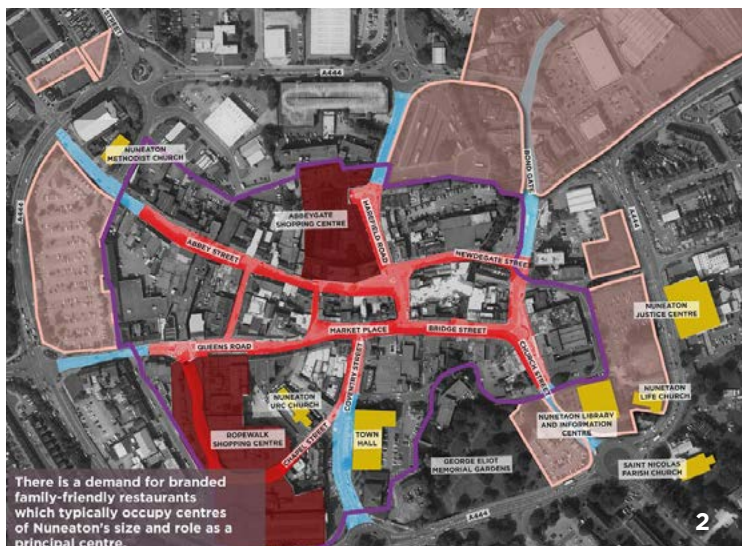
Job name:
Nuneaton regeneration

Location:
West Midlands

Client:
Nuneaton & Bedworth Council; Warwickshire County Council

Date of completion:
ongoing

Site area:
10 ha.



2

Nuneaton is an attractive market town which is highly accessible by all transport modes, but most especially by rail. It also benefits from having a number of large development opportunity sites in the town centre which could significantly improve its potential to create a vibrant mixed-use place attractive to a younger market.

- Opening up the River Anker waterfront
- Creating a major new rail gateway
- Integrating rail and bus interchange facilities
- Improving the tourism and leisure offer
- Widening the retail offer to embrace town centre living

We were appointed to prepare an Initial Development Prospectus for presentation to developers at MIPIM, and subsequently to prepare more detailed development Briefs for the most important regeneration opportunities within the Ring Road:

1. VICARAGE STREET AERIAL
2. RETAIL PLAN WITH OPPORTUNITY SITES

CASE STUDY



1



2

IFIELD STRATEGIC DEVELOPMENT AREA

Job name:

Ifield Strategic Development Area

Location:

West Sussex

Client:

Homes England; Wellbeck Land; Rydon; Wates

Date of completion:

ongoing

Site area:

190ha.

Crawley was a classic 1940s New Town with 9 distinct neighbourhoods surrounding the urban centre and a large industrial estate separating the town from Gatwick to the north.

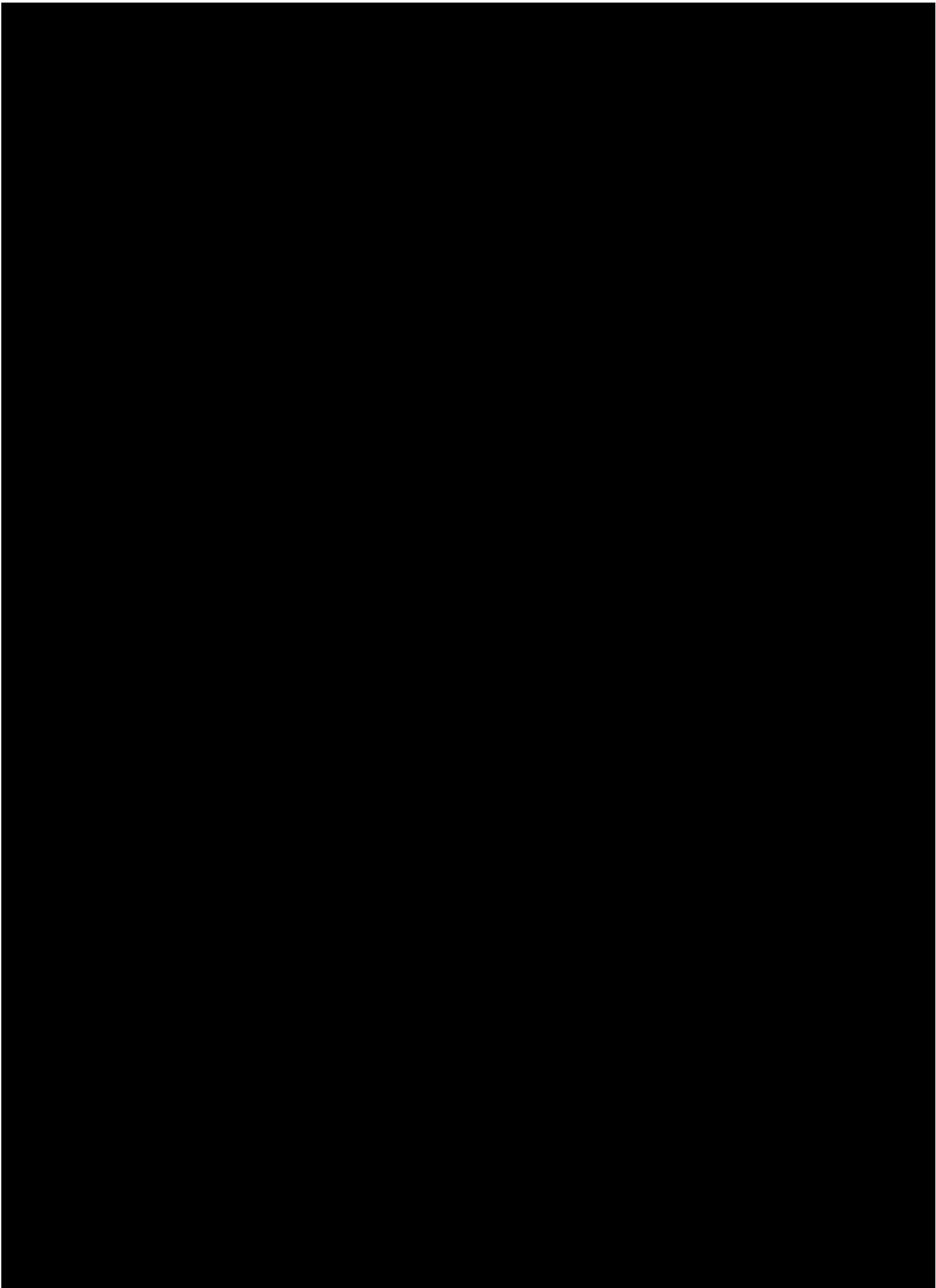
Since the original town's completion, 5 further neighbourhoods have stretched its boundary. Today there is little room left for expansion but land to the west of Ifield which has mostly been owned by the government since new town days. Carter Jonas have been commissioned by a consortium of

Homes England, Welbeck Land, Rydon and Wates to plan this 190 ha. site as a comprehensive urban extension of the town. This includes taking note of Gatwick Airport's planned expansion, the proposed West Crawley Relief Road, a complex flood relief strategy, and protecting the setting of old Ifield village. The proposals are for: over 3000 homes (of which 40% will be affordable); 1000 jobs; 3 schools and a local centre; set in over 50 % open space. Particular care has been taken to protect the setting of Ancient Woodland and other important wildlife sites.

1. GROUND LEVEL SKETCH

2. AERIAL SKETCH (WITHOUT FLOODING)

Carter Jonas



APPENDIX 2: CVS

**Steven Sensecall MRTPI**

Partner

Oxford

steven.sensecall@carterjonas.co.uk

01865 297705 / 07970 796762

Steven is Head of Carter Jonas' Southern Planning team having joined in May 2017 as part of the acquisition of Kemp & Kemp. He leads a team of 14 planning professionals working for a wide variety of public and private sector clients for whom the firm provides planning consultancy services on a national basis.

Steven appears regularly at Planning Inquiries and Development Plan Examinations in Public as both an advocate and expert witness. He is also a frequent speaker on planning matters.

Primary Skills

- Site-wide masterplans
- Securing planning permissions
- Development plans
- Expert Witness

Examples of Experience

- Leading the professional team appointed by Persimmon Homes to secure a housing allocation and outline planning permission for 2,500 dwellings and associated infrastructure on land at Grove Airfield.
- Acting on behalf of Berkeley Strategic in the promotion of circa 3,000 homes across four sites in Oxfordshire, Buckinghamshire, Bracknell and Suffolk.
- Promotion of a site in Oxfordshire through the development plan process for circa 3,500 homes with associated services and infrastructure, including improvements to the rail network.
- Acting for Berkeley Homes (Oxford & Chiltern) Limited and leading the professional team in securing permission in respect of a hybrid application (part outline, part detailed) for 750 homes on land at Warfield near Bracknell.
- Acting as lead consultant in securing outline planning permission on behalf of Lands Improvement Holdings Ltd for a scheme for 550 homes and a 23 hectare business park on land at Oteley Road South, Shrewsbury.
- Acting for the Dean and Chapter of St Paul's Cathedral in pursuing an appeal and revised planning application for housing on land at Tillingham in Essex.
- Acting for Herford College, Oxford on a scheme for graduate accommodation on land owned by the College.
- Retained for over 25 years by the United Kingdom Atomic Energy Authority (UKAEA) and then by Harwell Campus Partnership to deal with all planning and development matters relating to Harwell, Oxford. Notable successes include:
 - Co-authorship of *Laying the Foundations*, which set out the blueprint for the redevelopment of the Harwell Oxford Campus
 - Securing a site-wide employment and housing allocation in the Vale of White Horse Local Plan 2011
 - Securing outline planning permission for the first phase of new employment development on land north of Fermi Avenue
 - Securing outline planning permission for 275 homes at Chiltern Field
 - Securing detailed planning permission for Diamond Synchrotron
 - Securing outline planning permission for circa 120 homes on land at South Drive.

- Retained for over 20 years by the United Kingdom Atomic Energy Authority (UKAEA) to provide planning consultancy services in connection with Culham Science Centre (CSC). Notable successes include:
 - Securing confirmation from South Oxfordshire District Council (SODC) that the original Culham Laboratory had a lawful Class B1 Business Use, which provided the foundation for future development/redevelopment on the site
 - Arguing successfully at the SODC Local Plan Inquiry that the CSC should be identified in the Local Plan as a *major developed site in the Green Belt* where infilling and redevelopment would be permissible
 - Renewing/extending the JET temporary permissions to allow the continued operation of that facility
 - Securing permission on appeal to replace demolished floorspace with new B1 development
 - Securing an allocation in the SODC Core Strategy for the intensification of development at the CSC and the creation of circa 1,000 new jobs
 - Working up and agreeing a Masterplan Framework for the CSC as a whole and agreeing the same with officers from SODC as the basis for a Supplementary Planning Document (SPD) for the site
 - Securing planning permission for a new building for Reaction Engines
 - Securing a resolution to grant planning permission for permanent planning permission for the general purpose JET buildings
 - Securing a resolution to grant planning permission for the Phase 1 redevelopment comprising 9,000 sqm of new Class B1 development
 - Securing planning permission for a new Remote Applications in Challenging Environments (RACE) building
 - Securing planning permission for a new Materials Handling Facility.
 - Acting on behalf of the Dragon School, Oxford in respect of various planning matters including the development of a site-wide masterplan.
 - Appointed by Abingdon School to develop a site-wide masterplan and to handle detailed planning applications for a New Science Centre and a new Humanities building.
 - Agreeing a site-wide masterplan for new development in the Green Belt at the Manor School in Oxfordshire and then securing a hybrid planning permission pursuant to the masterplan for a new sports hall, a swimming pool, new classrooms and amended parking and circulation space.
 - Appearing at the Oxford Core Strategy, West End Area Action Plan, Sites and Housing DPD and Barton AAP Examinations in Public on behalf of a range of clients to object to various policies relating to housing provision and heritage matters.
 - Appearing on the instructions of Leda Properties Ltd at a three week Public Inquiry in respect of an Appeal against enforcement notices issued against unauthorised activity in circa 60,000 sqm of redundant military accommodation at Aston Down Airfield, near Stroud in Gloucestershire. The Secretary of State allowed the Appeals.
 - Instructed by the London Borough of Harrow to appear on its behalf at a 'called-in' Public Inquiry in respect of proposals for housing in the Green Belt and an extension to a country park. The Secretary of State determined that the proposal should be allowed to go ahead.
 - Acting for the London Borough of Harrow in connection with three Public Inquiries in respect of a major town centre redevelopment scheme; a scheme for residential development on Metropolitan Open Land and residential development on a redundant education site in the Green Belt.
 - Appearing as advocate for Oxford Preservation Trust at a Planning Inquiry to oppose an appeal by Oxford University against the decision of Oxford City Council to refuse its application for a new Book Depository on land at Osney Mead, Oxford. The Appeal was dismissed.
 - Appearing as an expert witness on behalf of the London Borough of Bromley at two public inquiries in respect of housing proposals on land at the former Footsie Social Club site and All Saints Catholic School.
 - Instructed by Medway Council in connection with a 'call-in' Inquiry for circa 5,000 homes on land at Lodge Hill, Chattenden.
 - Appearing as advocate for Oxford Preservation Trust at the 'call-in' Inquiry into the application to redevelop the Westgate Centre in Oxford. OPT was a Rule 6(6) party and objector to the scheme. The application was refused.
-

- Securing a Local Plan application for Müller UK for some 31 hectares of new employment development at Market Drayton in Shropshire and then pursuing an outline planning application for a new 1,100 sqm, 28-metre high production facility, planning permission for which was secured.

Qualifications

Member of the Royal Town Planning Institute

Graduate Diploma Planning for Urban Conservation and Renewal

BA (Hons) Planning Studies

Career

2017 to present: Equity Partner, Carter Jonas

1982 to 2017: Kemp & Kemp LLP



**Johnny Clayton, BA (Hons) PGDip
UDGM CMLI**

Partner, Head of Masterplanning
London – Operating nationally
Johnny.Clayton@carterjonas.co.uk
020 7518 3226 / 07557 428136

Johnny Clayton joined Carter Jonas in July 2018 to head up the Masterplanning and Urban Design practice across the UK. Johnny is a Masterplanner and Urban Designer, with a broad skills base and over 18 years of project experience, through which he has undertaken extensive urban regeneration work. Johnny is a member of the Urban Design Group and also a Chartered Landscape Architect.

Johnny qualified as an Urban Designer at Westminster University, prior to which he gained a diploma and degree in Landscape Architecture from Leeds Beckett University. He commenced his career within the Environment Unit at Nottingham City Council where he was involved with planning the NET tram link through the city centre, together with urban regeneration projects at St Ann's and The Meadows, two deprived parts of inner city Nottingham. He then moved to a Midlands-based planning consultancy, RDC, where he spent three years working predominantly on residential development applications for both urban and green-field sites. Major masterplan projects included Faygate urban extension in Peterborough, a mixed use masterplan for 750 new homes and numerous projects for house builder clients throughout the Midlands and East Anglia.

Johnny moved to HLM Architects in London in 2006 where he was based for five years. During this period, Johnny worked on several major urban regeneration projects within London including Woolwich Civic Offices for The Royal Borough of Greenwich, Greenwich Movement for Cathedral Group and Chelsea Estate for Affinity Sutton. He also created a masterplan for 500,000sqft of commercial development at Imperial House Windsor for St Congar. Both the Woolwich and Greenwich projects were taken through to delivery and client handover.

In 2011, Johnny moved to global design firm Gensler to gain international experience and spent the subsequent three years working on projects in Europe, the Middle East and Asia. Major projects included Msheireb Downtown Doha, the redevelopment of a square kilometre of Doha city centre, and a masterplan for the Royal Dutch Shell Headquarters in The Hague. Back in the UK, Johnny spearheaded a major urban masterplan on behalf of Birmingham City Council at Spitalfields in the city, a seventeen hectare mixed-use development which is now an integral part of the Big City Plan. He also developed masterplan proposals for the Royal Docks, including City Airport in east London.

Johnny founded the Urban Design Studio at property firm Bidwells LLP in 2014, where he grew a team of ten people over a four year period, undertaking masterplanning projects across the south of England. Major projects included the design of eight garden village scale settlements, including sites at Great Chesterford in Uttlesford District and Dunsfold in Surrey. He was also involved with the masterplanning, design and delivery of over half a million square feet of new commercial space at Cambridge Science Park on behalf of Trinity College and MACE Developments.

Since joining CJ in 2018, Johnny has been involved with several town centre regeneration projects including Sudbury and Nuneaton. Most recently he has undertaken a six month exercise working closely with Cannock Chase Council in Staffordshire to create a development framework for their town centre and a market-facing Development Prospectus for 17 urban sites. Johnny has also led on major mixed-use masterplans at West of Ifield, Crawley for Homes England and Sir John Moore Barracks on behalf of the DIO.

Primary Skills

- **Considerations for development** - Contextual analysis of urban areas and assessment of site-specific constraints / opportunities for development.
- **Development options and design solutions** - Creating contextually responsive, commercially intelligent and planning compliant design solutions for sites and exploring options for development.
- **Feasibility and capacity studies** – Undertaking feasibility / capacity work for urban sites, including coordination with specialist viability, planning and transport consultants.

- **Public engagement and stakeholder engagement** – Expressing narratives / storytelling through the assembly of exhibition material and the delivery of key messages to different audiences. The production of event material and assembly of tailored presentations to key stakeholders / decision makers.
- **Sectors and work stages** - Working with both public and private sector clients to deliver urban regeneration frameworks. Johnny also has extensive experience of delivering major construction projects from conception through to handover during the post-planning stage.
- **Development frameworks** – Producing development frameworks for both urban and rural sites.
- **Planning documentation** - Developing Area Action Plans, SPD's and Development Prospectuses on behalf of public sector bodies.

Examples of Experience

Project: Cannock Town Centre Regeneration

Client: Cannock Chase Council

Size: 17 town centre sites

Scope: Town Centre Framework and Development Prospectus, including Stakeholder Engagement

Johnny is currently leading a team progressing a Development Prospectus over a 6-month period on behalf of Cannock Chase Council in Staffordshire, working closely with the Economic Development Service, together with our in house Development Consultancy and Town Planning teams. The prospectus builds upon an Area Action Plan (AAP) produced in early 2018, with the intention to create a market-facing prospectus document to enable engagement with private sector investors and developers. The document includes a new development framework for the town centre and a series of capacity / feasibility studies for 17 Council-owned town centre sites as part of the broader framework. The prospectus, which is due to be completed and launched in early August 2019, will form the basis for the future regeneration of the town centre. Over the life of the project the Carter Jonas team have worked cohesively to deliver the document on time and on budget and we have developed a strong working relationship with the Local Authority team.

Project: Cambridge City Centre

Client: Cambridge City Council

Size: 10 urban sites

Scope: Feasibility / Capacity Study

Johnny is working as part of the wider planning and viability team to undertake feasibility and capacity studies for ten city centre sites in central Cambridge on land under the ownership of the City Council. These range from 3-4 residential properties to some larger employment sites. The design and viability exercise is due for completion in the summer of 2019, with the aim to aid the Council's decision making process, including disposal of assets.

Project: Barnet & Southgate College

Client: Barnet & Southgate College, Royal Mail, Barnet Council

Size: 0.8 hectares, 240,000sqft mixed use development

Scope: Feasibility / Capacity Study

The project is a feasibility and capacity study for an area of developed land close to Southgate Tube Station in north London under multiple ownerships including Barnet Council, Royal Mail and Barnet & Southgate College. Working alongside Carter Jonas Town Planning and Development Consultancy teams, Johnny has led the team designing a series of phased development options which are undergoing viability testing to understand the commercial advantages of each options for each land owner. This is an iterative process working closely with the viability team to inform the client parties of the most commercially viable option for their asset / land holding, the subsequent planning promotion strategy and eventual disposal.

Project: Swedish Wharf, London

Client: Fuel Oils

Size: 0.5 hectares, 240 residential apartments

Scope: Feasibility / Capacity Study

Johnny has led a design team to progress proposals for an urban wharf site close to Wandsworth Bridge in west London. Development of the complex site involves exploring multiple scenarios across three separate land

ownerships, including a protected wharf designation, to determine the most commercially viable option for each party whether acting alone or collaboratively. The feasibility / capacity study was completed in February 2019.

Project: Spitalfields Birmingham

Client: Birmingham City Council

Size: 17 hectares

Scope: SPD, Framework and Masterplan Vision

During his time at global Architecture firm Gensler, Johnny spent two years working in Birmingham assisting the City Council to develop the Big City Plan proposals for Spitalfields, an urban area south of the existing Bullring and former home to the wholesale markets. During this time Johnny forged a strong working relationship with the Urban Design team at the Council which remains today, together with the head of city centre regeneration. Plans for Spitalfields, which included extensive leisure use development, a covered public market, new residential buildings, a major tourist attraction (museum) and an up to 40-storey mixed-use tower are currently being progressed with a development partner having been incorporated within the Big City Plan.

Project: The Movement, Greenwich, London

Client: U&I, Cathedral Group

Size: 10-hectares of urban land, £75million

Scope: RIBA Stages 0-7

The project comprised the redevelopment of a disused industrial site adjacent to Greenwich DLR Station, formally used as a train wrecking yard in the post WWII era. The mixed use development includes, 170 student beds, 50,000 square feet of commercial office space, 270 social and market residential units, 30,000sqft of retail space, incubator and live-work units, a boutique hotel, Travelodge, a community centre and gallery. Johnny worked as lead urban designer on the project over a 4-year period through RIBA stages 0-7 and the project was successfully delivered in 2015.

Project: The Royal Docks, London

Client: London Borough of Newham

Size: 100 hectares

Scope: Masterplan Vision, Feasibility / Capacity Study

A visionary study for redevelopment of the Royal Docks site in Newham. Following the construction of an estuary based airport, a remote terminal is retained at the site of the current City Airport. The current runways become a central park framed by tall residential buildings. ExCel London and the Siemens Centre are joined by a series of new buildings to become a world leading conferencing and exhibition centre. A new pedestrian bridge links the site with the south of the river, with new embankments to north and south river banks supporting tube and tram transportation systems together with cycling and pedestrian movements.

Project: Woolwich Civic Offices

Client: Royal Borough of Greenwich

Size: £55 million civic regeneration project

Scope: RIBA Stages 0-7

Completed in 2011, the project brings together Greenwich Council services from several disparate locations into a new central hub within Woolwich Town Centre. The project forms a key part of the wider Woolwich master plan improvement district. The publicly accessible building will provide community social support services, a public library, five floors of office space and a roof top exhibition gallery and public cafe. The Breeam Excellent building has strong green credentials with extensive solar panelling at high roof level, a biodiversity eco roof, accessible green roof terraces and new public realm linking right through the centre of the building via an internal street.

Qualifications

PG (Cert) Urban Design – University of Westminster

Dip Landscape Architecture – Leeds Beckett University

BA (Hons) Landscape Architecture – Leeds Beckett University

Chartered Member of the Landscape Institute – 2008

Member of the Urban Design Group / Registered Practitioner

Career

2018 -	Partner, Head of Masterplanning at Carter Jonas LLP
2014 - 2018	Partner, Head of Urban Design at Bidwells LLP
2011 - 2014	Associate at Gensler
2006 - 2011	Urban Designer at HLM Architects
2003 - 2006	Urban Designer at Robert Doughty Consultancy
2001 - 2002	Nottingham City Council Environment Unit



Glen Richardson MSc BA

Associate Partner

Cambridge

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Glen has over 25 years of experience in managing a wide range of planning and urban design projects, development frameworks, providing expert evidence in design and planning matters and various public infrastructure projects, principally in the municipal sector. He has proven abilities in generating design solutions and negotiating successful solutions to urban planning and design challenges.

Glen has international experience having worked in various parts of the UK, as well as Canada and Spain. He has a Master of Science degree from Heriot-Watt University in Edinburgh (1993) and has worked, lectured and mentored extensively on urban development, regeneration, urban design and strategic planning subjects in the UK, most recently in Cambridge and the East of England. He headed the urban design and conservation teams at Cambridge City Council for 12 years between 2004 and 2016 and oversaw a significant number of strategic regeneration, design, conservation and planning projects during a time when Cambridge developed as one of the most vibrant and successful cities in the UK.

Glen has been project manager for a wide range regeneration projects, principally in Cambridge, the East of England, and Kitchener (Ontario, Canada) including:

- Mitcham's Corner Development, Cambridge – Framework Supplementary Planning Document (Draft) 2016
- Mill Road Depot Planning and Development Brief, Cambridge – Supplementary Planning Document (Draft) 2016
- Ridgeon's Cromwell Road Development Framework, Cambridge – Supplementary Planning Document 2016
- New Museum's Supplementary Planning Document, Cambridge 2015
- Cambridge North Fringe, Cambridge – East Action Plan, Design Lead 2015
- Cambridge Skyline Guidance 2012
- Public Art Supplementary Planning Document, Cambridge 2010
- Old Press Mill Lane, Cambridge – Supplementary Planning Document 2010
- Cambridge Nature Conservation Strategy 2006
- Downtown Strategic Plan, Kitchener Ontario 2004

Primary Skills

- Urban regeneration for public and private sector
- Preparation of mast plans and development frameworks, site layouts and capacity testing, preparation of design and planning documents
- Masterplanning of residential and commercial projects
- Management of workshop and consultation exercises

Examples of Experience

Great Yarmouth Town Centre (2018): Glen has been involved in preparing development briefs following Carter Jonas' preparation of a Town Centre Initiative (TCI) and Masterplan Vision for Great Yarmouth Town Centre. The TCI looked at a menu of quick-wins which can help to begin to bring about change in the town centre, addressing immediate concerns such as empty shops, signage and linkages, greening the town, the market, parking, events and marketing. Glen project managed the preparation of two planning development briefs (as Supplementary Planning

Documents) for the Hall Quay and The Conge areas of the Great Yarmouth which enabled the borough council to then undertake broad stakeholder and public engagement on these key areas of the town.

Sudbury Town Centre, Hamilton Quarter (2018): Sudbury is an attractive market town in Suffolk with retail challenges and little in the way of a leisure offer for young people. The Hamilton Quarter had considerable design potential but was blighted by an unsightly bus station and a lack of coordinated design. Glen led the preparation of a development prospectus, following earlier stages of work undertaken by Carter Jonas, for the redevelopment of the area to a new quarter of mixed use retail, leisure, and town centre living. As part of the process there was extensive soft market testing with land owners, developers and investors which gave confidence to the District Council, the principal land owner.

Mitcham's Corner Development Framework (2016): Glen led an in-house council design team which prepared a framework strategy (SPD) on behalf of the council and Cambridgeshire County Council. Extensive consultation took place with the local community, the Highway Authority and various consultants in order to develop a hybrid planning and public realm & movement strategy to undo a one-way gyratory around an important node of Cambridge next to the River Cam.

Mill Lane Development Framework (2010): Glen project managed the preparation of a re-development strategy, prepared jointly with the University of Cambridge for an historic quarter next to the River Cam in central Cambridge. The strategy involved the preparation of a mixed use masterplan for new student housing, retail, leisure and recreation uses. The project required a very sensitive approach to heritage assets and a wide range of Cambridge colleges, landowners, amenity societies, residents, and others. The completed framework (SPD) has acted as the basis for a multi-million pound investment by the university and a first phase planning application has now been submitted.

Kitchener Downtown Strategic Plan (2004): Glen led the preparation of a strategic plan to support a \$110million in the regeneration of downtown Kitchener, an important city in Ontario, Canada, of 200,000 population and at the heart of an important employment and educational region of the province. He navigated through the challenge of negotiating with dozens of stakeholders to develop an economic, design and planning investment package which has since led to a significant amount of regeneration, investment and improved quality of life in the wider downtown area.

Qualifications

MSc Urban Design

BA Urban Geography

Career

2016 to present: Associate Partner, Carter Jonas

2004 to 2016: Urban Design and Conservation Manager, Cambridge City Council

2003 to 2004: Manager of Downtown Planning, City of Kitchener, Ontario

2002 to 2003: Manager of Design and Development/Manager of Parks Planning, Development and Operations, City of Kitchener, Ontario



Natalia Kowalska MSc, BA

Associate, Urban Designer

London

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Natalia is an Urban Designer in the Masterplanning and Urban Design team in London. She has some 10 years of professional experience gained in the UK, the Netherlands and Poland. Since joining Carter Jonas in 2014 Natalia has undertaken a wide range of work for both the public and private sector, including The Crown Estate, The Church Commissioners for England, Crest Nicholson, Network Rail and Homes England. With background in architecture, Natalia is responsible for the preparation of masterplans, promotion documents, detailed urban frameworks, design codes, capacity studies and planning applications.

Natalia graduated from the Faculty of Architecture at the University of Technology in Poznan (Poland) and the Faculty of Civil Engineering at Avans University in Tilburg (the Netherlands). During her studies, she had an internship at S333 in Amsterdam and Grath Architecten in Ravensburg, Germany.

After graduating Natalia worked as urban designer at LDA Design in London, where she was involved in two major mixed-use residential developments: an outline planning application for a new community of 4,000 dwellings at Waverley, Sheffield; and a strategic masterplan for a 12,000 dwelling sustainable urban extension to the east of Cambridge.

Natalia has also worked at Rothuizen NL (based in Poznan), where she was responsible for a range of urban regeneration and masterplanning projects, including delivering the local plan for Opalenica City Centre and the revitalisation of City Park in Blonie. Prior to joining Carter Jonas, Natalia worked at Barton Willmore in Reading, where she assisted with the preparation of masterplans, promotion documents and Design and Access Statements.

Primary Skills

- Sustainable design of new settlements and urban extensions
- Urban design of city centres
- Masterplanning of industrial sites
- Waterfront developments
- Urban regeneration for both public and private sectors

Examples of Experience

Coronation Sidings, Wood Green: Comprehensive mixed use development of a 1ha site in a rapidly changing area of north London on behalf of the owner Network Rail. Proposals include nearly 200 residential units, 5000 sq.m. of employment, food, drink and leisure facilities as part of a wider regeneration initiative. The scheme resolves rail constraints combined with the need for a people-friendly public realm.

Great Yarmouth Town Centre: Natalia has been involved in both a Town Centre Initiative (TCI) and Masterplan Vision for Great Yarmouth Town Centre. The TCI looks at a menu of quick-wins which can help to begin to bring about change in the town centre, addressing immediate concerns such as empty shops, signage and linkages, greening the town, the market, parking, events and marketing. The Masterplan provides a vision for the town centre over the next 15 years and identifies sites and delivery models to help secure the future of Great Yarmouth.

Sudbury Town Centre, Hamilton Quarter: Sudbury is an attractive market town in Suffolk with retail challenges and little in the way of a leisure offer for young people. The Hamilton Quarter had considerable design potential but was blighted by an unsightly bus station and a lack of coordinated design. The brief called for a mixed use masterplan including retail, leisure, cinema, arts centre and town centre living. As part of the process there was extensive soft market testing with land owners, developers and investors which gave confidence to the District Council which was the principal land owner.

Nuneaton Town Centre Investor Prospectus: Nuneaton is a market town of some 100,000 population strategically located between Birmingham, Coventry and Leicester. Like many traditional towns its retail core is struggling and it needs to reinvent itself with a more balanced mixed-use economy spread into food & drink, leisure and town centre living. The aim of the town centre study undertaken was to identify key opportunity sites and present these in a highly graphic brochure for distribution at MIPIM.

West Marina: On behalf of Hastings Borough Council, Natalia was involved in a preparation of masterplan for the last vacant site in Hastings Borough. The site has lain empty for over 30 years since West Marina swimming pool and subsequent holiday camp closed down. The team took an approach to work with the constraints rather than against them, which required the minimization of abnormal costs by clever design. Two residential schemes for up to 224 dwellings have been developed based on four key design elements; a central square over the undevelopable waste water reservoir and adjacent services, the retained seafront walkway/ cycleway enclosed by potential artists' colony and display space, an informal timber townhouses in the west and a more formal residential development in the east.

Bedford Health Village: This is a tightly developed town centre site, containing a range of different uses. We were commissioned by Bedford Borough Council to produce a series of masterplan options exploring various development scenarios, maximising various sites' development potential, improving circulation and car parking, landscape and wayfinding across the estate.

Wallingford: On behalf of Croudace Strategic, Natalia prepared an Initial Vision Document and promotion document for a 55 hectare site, north of the town centre to support the site allocation process. The site is excellently located for strategic road links and within 10-15 minutes of the town centre and all community and educational services. The site can accommodate up to 1,100 homes together with a primary school, local centre, parks and shelter belts. In addition the development is buffered from the adjacent AONB by an extensive Country Park, which wraps around the northern part of the site.

Qualifications

MSc, Eng. Architecture

BA Built Environment, specialisation in Town Planning

Career

2014 to present: Urban Designer, Carter Jonas

January to April 2014: Urban Designer, Barton Wilmore

2010 to 2013: Urban Designer, Rothuizen.nl

2007 to 2009: Urban Designer, LDA Design



Nick Mann BSc MA
Senior Urban Designer
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Nick joined Carter Jonas in July 2019 and brings 5 years of professional experience gained in the UK on a range of predominantly residential-led masterplanning and urban design projects. His project work to date has ensured a thorough understanding of the development process, contributing graphic and written outputs such as vision documents for site promotion, framework masterplans, detailed layouts, capacity studies, and materials to accompany planning applications.

Nick has a varied academic background, combining a joint honours degree in Geography and Planning from the University of Birmingham with a Masters degree in Urban Design from Oxford Brookes University. Together with professional experience in planning, urban design and masterplanning, Nick's background ensures that he is a well-rounded designer with a wealth of experience from which to draw.

Primary Skills

- Feasibility studies for urban sites
- Preparation of graphic material for masterplans and planning documents
- Masterplanning work to inform planning and viability appraisals
- Residential led masterplanning
- Production of written material to accompany design work

Examples of Experience

Capacity testing of key sites, Melton Mowbray: Working with planning, viability and highways advisors, Nick was a member of the design team which tested the redevelopment potential and residential capacity a number of key sites under the ownership of the local authority. This was to advise on the most practical and financially beneficial method of disposal. Whilst each site was considered on its merits and led by its constraints, they were also always considered as part of the whole town to demonstrate the overall strategy and how each site contributed to the improvement of the town.

Redevelopment options for a shopping centre, Sutton: Nick was part of the design team which produced potential redevelopment options for an existing shopping centre in Sutton town centre. The exercise involved understanding the key issues in the town centre, particularly regarding movement routes, and the outcome delivered to the client tested a number of residential, care and hotel layouts for different scenarios including partial and complete redevelopment. This work was produced in collaboration with viability consultants to ensure that the proposals were financially deliverable.

Testing residential redevelopment capacity, East Grinstead: Nick assisted with producing potential redevelopment options for an existing 'big box' retail site in a key location in East Grinstead. Testing the residential capacity of the site at varying densities, the resulting conceptual masterplans ensured the careful consideration of existing residents, and also a link to a strategic walking and cycling route to the station and town centre amenities.

Feasibility study, Folkestone: A client required a feasibility study to illustrate the redevelopment potential of a current department store in the town centre of Folkestone, Kent. Nick was involved in testing the residential capacity of the site, which included the retention of an existing basement. The capacity data was also relayed to a viability consultant to further advise the client on potential future options.

Industrial redevelopment, Chadwell Heath: Nick helped to produce a residential masterplan for an existing employment site in East London, close to a future Crossrail station. Considering the impact of continuing employment uses on adjacent sites, the masterplan proposed to deliver 300 dwellings centred around a shared amenity space. The design material was used to promote the site to potential purchasers, demonstrating residential potential.

Town centre strategy, Ashford: Nick was part of the design team which produced a potential strategy for Ashford town centre, Kent. Illustrating key issues regarding active frontages, circulation and identifying areas of severance, the output delivered a number of key recommendations for regenerating the town centre, with the client's landholding in a central position.

Qualifications

MA Urban Design (Oxford Brookes University)

BSc Geography & Planning (University of Birmingham)

Career

2019 – Present: Senior Urban Designer, Carter Jonas

2014 – 2019: Icení Projects Ltd

Senior Urban Designer (Dec 2017 – July 2019)

Urban Designer (Dec 2015 – Dec 2017)

Assistant Planner (Sept 2014 – Dec 2015)



Huw Mellor MRTPI

Partner
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Huw joined Carter Jonas in May 2017 as part of the firm's acquisition of Kemp & Kemp, an Oxford-based Planning Consultancy. He has over 35 years of experience in the provision of planning consultancy services, working both within consultancies and local authorities.

Huw has a team of six qualified planners providing planning consultancy services to a variety of private and public sector clients for whom the firm provides planning consultancy services on a national basis.

Examples of Experience

- Appearing as expert witness at appeal in a consultancy role on behalf of various clients across the full range of planning related matters.
- Member of the Oxford City Council User Panels Group, advising on the Council's planning function.
- Planning consultant to various Oxford University colleges.
- Expert planning witness at the High Court on behalf of a national hotel group.
- Acted as advocate at Public Inquiry.
- Planning consultancy advice across the full planning range including residential, commercial, education, leisure, waste, affordable housing etc.

Qualifications

Member of the Royal Town Planning Institute

BA (Hons) Town and Country Planning

Career

2017 to present: Partner, Carter Jonas

2003 to 2017: Partner, Kemp & Kemp

2001 to 2003: Senior Planner, John Phillips Planning Consultancy

1991 to 2001: Assistant Principal Planner: Development Control, Oxford City Council

1988 to 1991: Planning Assistant: Local Plans, Cheltenham Borough Council



Stephanie Weeks MRTPI

Associate Partner

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Stephanie is a Chartered Town Planner with thirteen years' experience gained in both the public and private sectors. Stephanie's experience is focused on large residential mixed use regeneration schemes in the South of England.

Stephanie is adept at managing multi-disciplinary project teams and providing strategic advice to tackle complex planning issues. She has developed strong negotiation skills that derive from understanding the importance of commercial factors influencing development.

Primary Skills

- Providing strategic advice on complex, residential-led mixed use schemes
- Advising on affordable housing, Section 106 and CIL
- Management of multi-disciplinary project teams
- Promotion of land through the Development Plan process
- Appearing as an expert witness at appeal hearings

Examples of Experience

Finberry, Ashford – acting in partnership with Crest Nicholson Strategic Projects and The Church Commissioners for England in respect of an urban extension area to the south east of Ashford town centre. The proposal comprised 1,100 residential units, 70,000 sqm of business floor space, mixed use community facilities, public open space.

Land at Warfield, Bracknell – preparation of a full planning application of 53 residential units and SANG on land forming part of a wider sustainable urban extension.

Iffley Road, Oxford – management of a full planning application for the redevelopment of the site to provide 117 student rooms, private self-contained flats, B1 floor space and ancillary facilities. This instruction includes the discharge of conditions and the negotiation of Section 106 and Section 278 agreements.

Hans Krebs, Oxford – preparation of conditions and amendments for Phase 2 of the University of Oxford Biochemistry Building.

Beckton Waterfront, Newham – leading a multi-disciplinary team to establish the development potential of a new district centre on a strategically important Thames riverside site. Liaising closely with the GLA, Local Planning Authority and the Thames Gateway Development Corporation throughout the life of the submission.

National Grid Property – advising National Grid Property on a portfolio of redundant gas holder sites at eight locations across East London. This included promoting sites through the Local Plan, liaison with statutory and non-statutory authorities and making representations at Examinations in Public.

Small Sites Experience – advising a variety of private clients and on schemes of 10 units or less, public house conversions and conversions of agricultural buildings to residential accommodation.

Qualifications

Member of the Royal Town Planning Institute

MA Urban and Regional Planning, University of Westminster

BSc Human and Physical Geography, University of Reading

Career

Associate Partner, Carter Jonas (December 2014 – present)

Senior Associate Partner, Planning Perspectives LLP (November 2007 – December 2014)

Deputy Team Leader, London Borough of Harrow (May 2005 – November 2007)

Planning Enforcement Officer, London Borough of Enfield (June 2004 – December 2004)



Mark Utting MRTPI
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Mark was elected a Member of the Royal Town Planning Institute in June 2013. He is driven and team orientated with a broad range of Public and Private sector planning experience. Mark has overseen planning application for a wide range of small, medium and large residential and mixed use schemes. He also provides planning advice to a broad client base including private landowners, developers and the public sector.

Primary Skills

- Project managing a broad range of small, medium and large projects.
- Representing clients through the Local Development Framework process.
- Preparing, submitting and negotiating planning applications.
- Leading pre-application enquiries.
- Project managing public consultation events.
- Leading written representation appeals.
- Providing support at Public Inquiries, Hearings and Local Plan Examinations, including leading the preparation of supporting evidence.
- Undertaking site appraisals and providing advice to clients with respect to development opportunities.

Examples of Experience

- Leading a variety of small and medium sized planning applications throughout southern England.
- Promoting the redevelopment of Dalton Barracks Airfield for residential-led development through the Vale of White Horse Local Plan Part 2.
- Providing strategic planning advice for Peterborough Diocese Board of Finance.
- Promoting land north east of Slough for a new urban extension through the emerging Local Plans for Slough, Chiltern and South Bucks District Councils.

Qualifications

Member of the Royal Town Planning Institute

Master of Town Planning

Career

January 2017 to present: Senior Planner, Carter Jonas, Oxford

2014 to 2016: Planner and Senior Planner, Barton Willmore, Reading

2012 to 2014: Graduate Planner and Planner, West Waddy ADP, Abingdon-on-Thames

April 2012 to July 2012: Planning Assistant, Caldecotte Consultants, Buckingham

February 2011 to April 2012: Planning Assistant, Plymouth City Council

Contact

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01442 835999

Qualifications

HNC Civil Engineering

Employment History

2001 -	Glanville Consultants Ltd
1996 - 2001	Structural Design Partnership
1993 - 1996	Three Valleys Water

From 1991 to 1996 David worked for the Three Valleys Water Co at their regional office in Rickmansworth. Initially employed as a draughtsman and then seconded to the Geographic Information System team, where he was responsible for the processing and issuing of NRSWA enquiries and notices.

Following the transfer of all asset data information to digital format in 1993, the G.I.S. team was incorporated into the developer services department. From this time David studied for an HNC in Civil Engineering at Oaklands College on a day release basis for three years. Whilst working in developer services he was responsible for the design and costing of new mains and services for developers.

on graduating in 1996 David moved to Structural Design Partnership (St. Albans) where he was primarily involved in the design and preparation of drawings for residential and industrial developments. This mainly involved the design of levels and drainage of roads for adoption under Sections 38 and 106 of the Highways Act and Section 104 of the Water Industries Act, liaising with the local highway and water authorities thereto. Other duties included liaising with statutory authorities for services infrastructure and service connections.

He has been involved in a number of large-scale housing projects for numerous developers, including developments at Huntonbury Village, Leavesden and Barking Reach, Barking.

Typically, these projects required detailed storm and foul water sewer design to pre-defined discharge limits and liaison with water authorities and the Environment Agency. He therefore has experience of the evaluation and design of different surface water attenuation systems and more recently Sustainable Urban Drainage Schemes (SUDS).

David was also involved in a number of 'brownfield' developments requiring the remediation of contaminated land.

In May 2001 he joined Glanville Consultants as a Senior Technician responsible for infrastructure design. His responsibilities have included Planning Supervision under the Construction Design Management (CDM) Regulations, the preparation of feasibility studies for new developments and the design of external works for commercial developments. He has also been involved in liaisons with the Environment Agency regarding the problems associated with developments on contaminated land. David was promoted to Principal Engineer in January 2008.

Contact

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Qualifications

HNC Mechanical & Production Engineering

Employment History

2017 -	Glanville Consultants Ltd
2013 - 2017	PT Planners Ltd
2005 - 2013	Hyder Consulting / BTP
2001 - 2005	JMP Consulting Ltd
1998 -1999	National Grid Plc
1996 - 1997	AMEC - Designer
1989 - 1996	Costain Engineering Ltd

Mike joined Costain Engineering Ltd on leaving school and commenced an apprenticeship as a designer at which time he received an HNC in Mechanical and Production Engineering. He continued with Costain providing designs for a range of oil and gas projects.

He then worked as a freelance designer; initially with AMEC working on the Shearwater gas platform, then with National Grid designing electricity towers and finally with the London Borough of Enfield as a Senior Transport Technician responsible for local road safety schemes.

In 2001 Mike joined JMP Consulting Ltd, delivering urban development projects for both the public and private sectors. Responsibilities included; networked and isolated traffic models using; LinSig, Vissim, TRANSYT, ARCADY and PICADY, preliminary and detail junction design, cycle and pedestrian audits and, implementation of Controlled Parking Zones.

Mike commenced working for Hyder Consulting / BTP in 2005, supporting the delivery of residential, retail, commercial, and educational developments. Responsibilities included transport masterplanning, Transport Assessments and Travel Plans, access strategy, new bus route development, mitigation measures, public consultation and transport workshops. He was the lead transport engineer for the core strategy submission for a new settlement providing; circa 5,000 homes, offices, schools, retail. Responsible for all transport aspects of the development he led negotiations with the Local Authority and Highways England culminating in a successful agreement. He also provided transport planning advice to support planning applications as part of the 'Building Schools for the Future' initiative.

In 2013 working for PT Planners as an Associate Transport Planner Mike provided all aspects of transport planning advice to support the delivery of schemes such as urban extensions, residential development, education and community use.

In 2017 Mike joined Glanville Consulting as a Principal Transport Planner providing transport planning advice on a wide range of developments.

Example Projects

Dalton Barracks – Pre-Planning Advice, circa 1,200 new homes and employment floorspace, development of access strategy including input to negotiations with landowners, preparation of area wide model. *Client – Defence Infrastructure Organisation*

Porsche – Transport Assessment and Travel Plan, traffic impact assessment and design advice for new showroom and garage. *Client - Inchcape*

Project Gemini – Transport Assessment and Travel Plan for a new high intensity laser facility, including rationalisation of wider campus carpark facilities. *Client – Mace Group*



Emma Jewson MRICS

Partner

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Emma is a Partner based in our Planning and Development team in Oxford. She has worked within the Oxfordshire market for over 25 years in the commercial and residential sectors and currently advises clients primarily across the south of the United Kingdom.

Emma advises a wide range of clients – private, corporate, public sector and institutional, providing strategic development advice including viability appraisals, site assembly, option agreements and land acquisitions, marketing and disposals. Emma deals with both residential and mixed use development opportunities across Oxfordshire and surrounding counties. As an RICS registered valuer Emma values a range of residential and mixed use properties for lending, tax and accounting purposes

Primary Skills

- Provision of strategic advice to identify best value for the client to include development and planning appraisals.
- Preparation and implementation of comprehensive marketing strategies for disposal.
- Acting for a wide range of clients including corporate, private, charities and public sector in the disposal and acquisition of property assets.
- Over 25 years of working across Oxfordshire and the south, engaging with landowners, developers and occupiers.
- RICS Red Book valuations and Market Appraisals to support the above.

Examples of Experience

- Providing strategic long term development advice for an Oxford based public sector client to include identifying range of uses including residential, care home and student accommodation to satisfy both planning policy and financial viability, appropriate mix of development delivering best value and target end users.
 - Marketing and negotiating the disposal of a prime residential development site for 270 dwellings in Littlemore Oxford to a national house builder on behalf of the Oxford University Hospitals NHS Foundation Trust.
 - Undertaking a Viability report on behalf of an Oxford college to demonstrate that a proposed redevelopment of residential post graduate accommodation could not afford a financial contribution towards affordable housing.
 - Advising a County Council in the appropriate procurement method to maximise capital receipts and income generation from a large portfolio of surplus property assets; most likely by way of a strategic joint venture with a partner selected through the OJEU competitive dialogue process.
 - Marketing and negotiating the disposal of a residential development site for 150 dwellings in Wells, Somerset to a national house builder on behalf of the Church Commissioners.
 - Negotiating the prices paid for various residential development sites in Northamptonshire under option agreements with house builders including David Wilson Homes and Barwood, acting for the landowners.
 - Marketing and securing the sale of a Grade II* Listed Officer's Mess for the Defence Infrastructure Organisation achieving in excess of the guide price via a formal tender process.
 - Negotiating Collaboration and Promotion agreements with three landowners in order to progress the sale, via informal tender, of a consented residential development opportunity for 250 dwellings in Buckinghamshire acting for local authority client.
 - Provision of Market Value and Market Rent Red Book Valuations of a range of residential and commercial properties.
-

- Advising a local authority client on a residential redevelopment of a surplus commercial site including the assessment of the impact of a restrictive covenant and the strategy to modify or discharge either by negotiation or application to the Upper Land's Tribunal.

Qualifications

Member of the Royal Institution of Chartered Surveyors

RICS Registered Valuer

BSc Estate Management

Regional Chairman - Women in Property Thames Valley Satellite Branch 2011-12

Career

2013 to present: Partner, Carter Jonas

1998 to 2013: Partner (since 2006), Kemp & Kemp

1993 to 1998: Consultant, Jewson Holdings Ltd

1992 to 1993: Senior Surveyor, Carter Jonas

1988 to 1992: Graduate Surveyor, Chesterton

**Jon Pinkerton BSc (Hons) MRICS**

Partner

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Jon is Head of the London Development Consultancy at Carter Jonas. He was formerly head of Public Sector at GL Hearn. Jon provides development consultancy and strategic property advice to local authority, public bodies and private sector clients. He has advised on a wide range of projects including town centre developments, regeneration schemes, masterplans, option feasibility studies and estates strategies. He specialises in the structuring of delivery strategies and the procurement of development partners for major regeneration projects.

Examples of Experience**Ebbsfleet Development Corporation**

Provided valuation advice and consultancy advice in relation to Milton Place and Canal Basin, Gravesend and Station House, Station Road, Northfleet.

Royal Borough of Windsor and Maidenhead

Lead advisor to the Council on its regeneration programme for Maidenhead including advising the Council on the procurement of a joint venture development partner for the 1,000 home mixed use development of four town centre sites through the OJEU competitive dialogue process. This follows feasibility and planning work on the sites prior to marketing. JV signed with Countryside Properties August 2017.

Leicester City Council – Leicester Waterside

Property adviser to Leicester City Council on the 500 homes mixed use Leicester Waterside project, following the marketing and procurement of Keepmoat as developer partner through a HCA DPP2 process. CPO confirmed following Public Enquiry October 2017.

GLA – Beam Park, Dagenham

Advice on development capacity and viability and developer procurement via London Developer Panel for 29 ha GLA owned brownfield site in Dagenham. Identified capacity for c 2,000 homes. Legal agreement completed with Countryside Properties June 2017.

Medway Council/HCA - Rochester Riverside

Viability and delivery advice on preparation of new SPD for 25ha brownfield site for residential led mixed use development. Disposal strategy advice leading to marketing and disposal via EU negotiated procedure. Legal agreement completed with Countryside Properties March 2017. Planning permission granted for mixed use 1,400 home development in October 2017. First phase development due to commence in early 2018.

Qualifications

BSc (Hons)

MRICS

Career

2019 – present: Partner, Carter Jonas

2011 – 2018: GL Hearn, London

2008 – 2011; Knight Frank LLP, London

1997 – 2008: Donaldsons (merged with DTZ 2007), London

1993 – 1997: LB Hounslow, London

1988 – 1993: LB Lewisham, London



James Cordery MRICS

Senior Surveyor

Oxford

james.cordery@carterjonas.co.uk

01865 404478 / 07780 667005

James is a member of the Southern Planning and Development team working out of our Oxford office.

He assists in all matters associated with strategic and immediate development land opportunities and helps private and public sector clients in the delivery of development projects across the south of England. James has recently been shortlisted for the RICS Young Surveyor of the Year Award (2017).

Primary Skills

With experience gained across the Development, Infrastructure and Rural divisions, James has developed the following skill set:

- Disposal and acquisition of strategic land and immediate development opportunities
- Development strategy, promotion, option, hybrid and conditional agreements
- Planning appraisal and identification of development opportunities
- Red Book valuation
- Land assembly and management of strategic property portfolios including rural Landlord and Tenant

Examples of Experience

- **Crab Hill Development Area:** A significant strategic development opportunity in central Oxfordshire covering approximately 227 acres with outline planning permission for up to 1,500 new dwellings and ancillary mixed use development and infrastructure. Responsible for devising a land sales strategy for the disposal of serviced land parcels over a 10 year programme.
- **Perrybrook Development Area:** An urban extension to the northern edge of the Gloucester village of Brockworth with outline planning permission for 1,500 new dwellings and ancillary mixed use development and infrastructure. Responsible for the phased disposal of land parcels onto the open market.
- **North Abingdon-on-Thames:** An urban extension to the northern edge of Abingdon-on-Thames benefitting from outline planning permission for 900 new dwellings and mixed use development and infrastructure. Responsible for the phased disposal of land parcels onto the open market.
- **Land at Wareham, Dorset:** Acting for landowners in the procurement of a development/promotion partner for land benefitting from a draft allocation status for 500 new dwellings in the emerging Local Plan.
- **Land at Steventon:** A parcel of strategic development land with immediate planning potential. Successfully negotiated a conditional sale of the land to a national housebuilder on a subject to planning basis.
- **Land west of Bredon Road, Tewksbury:** Assisted in the successful disposal of a residential development opportunity with outline planning permission for a scheme comprising 68 new residential dwellings.
- **Ruabon Park, Wrexham:** Assisting with the disposal of a mixed use development opportunity with outline planning permission for a scheme comprising 319 new dwellings, a new business park and a mix of other commercial opportunities, marketed as a whole or in three lots.

Qualifications

Member of the Royal Institution of Chartered Surveyors

RICS Registered Valuer

BSc (Hons) Rural Land Management, Royal Agricultural University, Cirencester.

Career

July 2017 to present: Senior Surveyor, Carter Jonas

2016 to 2017: Development Surveyor, Carter Jonas

2013 to 2016: Graduate Surveyor, Carter Jonas

**Caroline Penn-Smith MRICS**

Partner

Birmingham

caroline.penn-smith@carterjonas.co.uk

0121 514 9596 / 07342 067831

Caroline has over 25 years' experience gained working predominantly within the West Midlands for several national practices and, prior to joining Carter Jonas, as Director of Property for a commercial, public sector backed property venture. She has experience over a wide range of property sectors and has acted in both a consultancy and agency capacity focussing mainly on the areas of development, investment and valuation.

Primary Skills

- Investment acquisition and disposal
- Occupier acquisition and disposal
- Valuation & Development Consultancy
- Consultancy services to the Public Sector

Examples of Experience

- Strategic review of over 1400 public sector assets to inform rationalisation of estates and maximise commercial investment, development and regeneration opportunities for Worcestershire County Council, Warwickshire and West Mercia Police, Redditch Borough Council, Worcester City Council and Hereford and Worcester Fire and Rescue Service.
 - Land assembly, acquisition, collaboration and ownership agreements for the development of several 'blue light' hubs.
 - Appraisal of the planning and development potential of 70 acres of land held as 8 sites at the eastern edge of Redditch (Redditch Eastern Gateway) to provide a range of options re potential commercial and residential development opportunities. Subsequent negotiation with adjoining landowner, procurement of development partner and infrastructure funding secured from Growing Places Fund. Ongoing involvement with project group to secure planning and market the opportunity to end users/funders.
 - Review, strategic and marketing advice to Severn Trent re portfolio of sites surplus to operational requirements.
 - Land assembly via CPO and marketing of Advanced Manufacturing Hub in Aston, Birmingham on behalf of HCA and Birmingham City Council.
 - Acted for National Grid in relation to gas holder sites including development appraisals, procurement of funding for remediation works, securing planning consent for high value end use, negotiating with adjoining landowners and subsequent marketing and sale of remediated land.
 - Consultancy for private landowners in relation to Birmingham Argyle Works and the wider McDermid Canning site. Provided advice on the building's current value and appraised the options for its future use and viability. Worked with planning department to secure a change of use from B2 general industrial to B1 business use, with the aim of providing a multi-let business environment for the creative industries sector.
 - Strategic and valuation advice to manufacturing company located in the centre of Gloucester Docks regeneration area to include development appraisals, planning and relocation advice.
 - Acquisition of a listed office building in central Birmingham for firm of architects and subsequent advice re refurbishment.
 - Advised listed property company in the acquisition of a £78m, 130 property portfolio. Subsequent business strategy and asset management advice.
-

- Acquisition and disposal of various investment properties for clients such as PRUPIM (now M&G), Moorfield, BSPF and a number of private property companies.
- Working with developer to provide advice to high profile manufacturing company prior to D & B and leaseback of new facility. Incorporated presentation of company background and financial information to potential purchasers and assisted specialist team on Capital Allowance assessment.
- Acquisition of prime Birmingham city centre office on behalf of Oppenheim.
- Advice with regard to sale and leaseback and loan security of £30m prime office and hotel in Birmingham City Centre.
- Valuation and strategic advice to NAMA re various investment properties and development schemes.
- Valuation and development consultancy to Calthorpe Estate re Birmingham city centre mixed use development.

Qualifications

Member of the Royal Institution of Chartered Surveyors

Career

August 2018 to present: Partner, Carter Jonas

2017 to August 2018: Director, Crosstrees Estates and Property Services Ltd

2016 to 2017: Director, Place Partnership Ltd

2006 to 2015: Associate Director, Savills

1998 to 2006: Associate, GVA Grimley



James Latham MRICS

Associate Partner

Oxford

james.latham@carterjonas.co.uk

01865 404470 / 07585 901591

James is an Associate Partner in the Commercial team based in Oxford and has over eight years of experience working in the South East property market. Prior to joining Carter Jonas in 2016, James worked client side in London as an Asset and Development Manager.

James has a First Class degree from Reading University in Land Management and has been a Member of the Royal Institution of Chartered Surveyors since 2013.

Primary Skills

- Development management consultancy to realise added value in redevelopment schemes
- Asset management in letting, acquisition and disposal of office/laboratory property, specialising in the life sciences, technology and R&D sectors
- Strategic property, development and masterplanning advice including the provision of development appraisals and financial models

Examples of Experience

- **Development advice** – James has been appointed as a development management consultant by the University of Oxford to work with their Asset and Space team to deliver the University's vision to create up to 1,500 new residential units and an innovation quarter on an 18 hectare industrial site in close proximity to the city centre.
- James is responsible for identifying and delivering key work streams, managing project finances, risks and leading the professional team appointed to produce a masterplan vision for the site. Key to the delivery of the project is identifying marginal viability gaps, i.e. where grant funding is required from third parties to bridge the gap between the total cost of the project and the end value of the scheme. James is responsible for producing cash flows and development appraisals required as part of funding applications made and securing funds via solicitors.
- **Asset Management Advice** – acting for local authorities, James works as part of a dedicated team to develop property strategies for their core holdings. James is used to managing large multi-let commercial estates to minimise voids, maximise income returns and realise redevelopment opportunities, producing detailed cash flows (including base case and enhanced case financial models) to analyse rates of return for clients in order to advise on the acquisition and disposal of stock.
- **Letting of commercial premises** – James acts for The Oxford Science Park and has let in excess of 70,000 sq ft of Grade A office space to technology and life science sector based companies since joining the team. James has helped set record rents in The Oxford Science Park's new state of the art 61,500 sq ft office building, The Schrodinger Building, at £32 per sq ft, completing new lettings to occupiers with bespoke laboratory and office requirements.

Qualifications

Member of the Royal Institution of Chartered Surveyors

BSc (Hons) Land Management

Career

July 2016 to present: Carter Jonas

2009 to 2016: Guildhouse UK Limited



Simon Mole MRICS

Partner

Winchester

simon.mole@carterjonas.co.uk

01962 833398 / 07919 694088

Simon is a partner in the Compulsory Purchase and Infrastructures team and has over 11 years of professional experience, advising both acquiring authorities and claimants from the public and private sectors across transport, infrastructure and regeneration schemes.

For those promoting powers, Simon has significant experience in all aspects including formulation, referencing, production of CPO documents, objection management, implementation of powers and negotiating claims.

For those resisting powers, Simon has experience in valuation, claim negotiation and drafting scheme objections. He has given evidence at CPO Inquiries and Hearings and has prepared expert evidence for the Upper Tribunal (Lands Chamber). Simon is a member of both the Compulsory Purchase Association and the National Infrastructure Planning Association. He is also a RICS Registered Valuer.

Primary Skills

- Advising on land assembly for major regeneration, transport and infrastructure projects
- Providing advice on strategy and implementation of compulsory purchase powers
- Drafting of documents and plans to support the making of CPOs
- Valuation, compensation estimates and budget forecasts
- Objection management and negotiations
- Preparing for and attending CPO Inquiry and the Upper Tribunal (Lands Chamber)
- Dealing with special category land issues

Examples of Experience

Transport for London – Crossrail II and Northern Line extension – advising TfL on Crossrail II in respect of potential station locations and route options across London and the South East in respect of development potential and land assembly issues. Advised TfL on the promotion of a Transport and Works Act Order to support the promotion of the Northern Line Extension scheme. Provided valuation advice and was responsible for the negotiation of agreements with affected parties prior to Public Inquiry.

Docklands Light Railway, various extensions, East London – advised DLR on a number of extensions and projects including London City Airport, Woolwich Arsenal extension and the Twin Tracking scheme. Responsible for maintaining land compensation budgets, claim negotiations and dealing with Lands Chamber references. Acquired land by private treaty required for DLR's projects.

Bristol City Council, Ashton Vale to Temple Meads, Bristol – project manager responsible for the land and property workstreams for this guided busway scheme being promoted under the Transport and Works Act 1992. Led discussions with landowners and supported the project through engagements with stakeholders. Led the land referencing and deposited plan production and provided land cost estimates across the life of the project. Led the objection management process leading to the withdrawal of several key objections and acted as the property expert witness at the Public Inquiry. Currently advising the Council on the implementation of powers and negotiating a complex overbridge agreement with Network Rail.

Orion Land and Leisure, Shepherds Bush Market – advised the developer on the preparation of a compulsory purchase order for this mixed use scheme in West London which includes a 300 stall market and a street of retail premises. Prepared a property cost estimate to inform the developer of the likely costs of relocating affected parties and prepared a land acquisition strategy to support the promotion of the Compulsory Purchase Order.

London Thames Gateway Development Corporation, Bromley by Bow – advised LTGDC on the use of CPO powers to promote a large mixed use scheme in East London. Provided a property cost estimate to inform LTGDC of the likely costs of exercising powers over properties including a large supermarket, petrol station and residential development land.

Solum Regeneration, Twickenham Station – advised Solum (a JV between Network Rail and Kier Properties) in respect of the compulsory acquisition of rights to supports a major redevelopment at Twickenham Station. Provided valuation advice and recommended the most appropriate use of powers by the local authority (LB Richmond upon Thames) to support the acquisition process.

Qualifications

Member of the Royal Institution of Chartered Surveyors

RICS Registered Valuer

Diploma in Surveying, College of Estate Management

BSc (Hons) Rural Resource Management

Career

2013 to present: Partner, Carter Jonas

2009 to 2013: Director and Head of Energy and Infrastructure, Ardent Management

2008 to 2009: Principal Surveyor, Compulsory Purchase and Compensation, GVA

2005 to 2008: Surveyor, Compulsory Purchase and Compensation, Donaldsons (latterly DTZ)

2002 to 2005: Graduate Rural Surveyor, Hobbs Parker

APPENDIX 3: SIGNED NDA

NON-DISCLOSURE AGREEMENT

BETWEEN

WEST BERKSHIRE COUNCIL

AND

Carter Jonas LLP

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THIS AGREEMENT is made on 22 November 2019

BETWEEN:

- (1) THE WEST BERKSHIRE DISTRICT COUNCIL of Council Offices, Market Street, Newbury, RG14 5LD (the "Authority"); and
- (2) Carter Jonas LLP [(registered in England and Wales with company number OC304417 whose registered office is at One Chapel Place, London, W1G 0BG (the "Organisation" and together with the Authority, the "Parties")].

WHEREAS:

Each Party wishes to receive Confidential Information from the other Party for the purpose of procurement of development consultancy services for West Berkshire Council; *note link with clause 2.1.5 (the "Permitted Purpose")*.

IT IS AGREED as follows:

1 Interpretation

1.1 In this Agreement, unless the context otherwise requires:

"Confidential Information"

means:

- (a) Information, including all personal data within the meaning of the Data Protection Act 1998, and however it is conveyed, provided by the Disclosing Party pursuant to procurement of development consultancy services this Agreement that relates to:
 - (i) the Disclosing Party Group; or
 - (ii) the operations, business, affairs, developments, intellectual property rights, trade secrets, know-how and/or personnel of the Disclosing Party Group;
- (b) other Information provided by the Disclosing Party pursuant to procurement of development consultancy services this Agreement that is clearly designated as being confidential or equivalent (whether or not it is so marked) or that ought reasonably to be considered to be confidential which comes (or has come) to the Receiving Party's attention or into the Receiving Party's possession in connection with the Permitted Purpose;
- (c) discussions, negotiations, and correspondence between the Disclosing Party or any of its directors, officers, employees, consultants or professional advisers and the Receiving Party or any of its directors, officers, employees, consultants and professional

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- advisers in connection with the Permitted Purpose and all matters arising therefrom; and
(d) Information derived from any of the above,

but not including any Information that:

- (i) was in the possession of the Receiving Party without obligation of confidentiality prior to its disclosure by the Disclosing Party;
- (ii) the Receiving Party obtained on a non-confidential basis from a third party who is not, to the Receiving Party's knowledge or belief, bound by a confidentiality agreement with the Disclosing Party or otherwise prohibited from disclosing the information to the Receiving Party;
- (iii) was already generally available and in the public domain at the time of disclosure otherwise than by a breach of this Agreement or breach of a duty of confidentiality; or
- (iv) was independently developed without access to the Confidential Information;

"Disclosing Party" means a Party that directly or indirectly discloses or makes available Confidential Information;

"Disclosing Party Group" means:

- (a) where the Disclosing Party is the Organisation, the Organisation and any company that is a holding company or subsidiary or subsidiary undertaking of the Organisation and any subsidiary or subsidiary undertaking of any such holding company; and
- (b) where the Disclosing Party is the Authority, the Authority and any Government Body with which the Authority or the Organisation interacts in connection with the Permitted Purpose and any subsidiary of the Authority;

"EIRs" means the Environmental Information Regulations 2004;

"FOIA" means the Freedom of Information Act 2000 and any subordinate legislation made under that Act, together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government Body in relation to such legislation;

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"Government Body"	means all Central Government Departments and their agencies and non-departmental public bodies;
"Information"	means all information of whatever nature, however conveyed and in whatever form, including in writing, orally, by demonstration, electronically and in a tangible, visual or machine-readable medium (including CD-ROM, magnetic and digital form);
"Information Return Notice"	has the meaning given to that expression in Clause 5.1;
"Permitted Purpose"	has the meaning given to that expression in the recital to this Agreement;
"Receiving Party"	means the Party which directly or indirectly receives or obtains Confidential Information;
"Receiving Party Authorised Person"	has the meaning given to that expression in Clause 3.1;
"Request for Information"	has the meaning set out in FOIA or any apparent request for information under the FOIA or the EIRs;
"Specified Scope"	has the meaning given to that expression in Clause 5.1;and
"Tender Documentation"	[all documentation issued by or on behalf of the Authority required to inform, regulate, conduct and complete any Authority procurement process arising out of or in connection with the Permitted Purpose which may lead to the award of a Contract(s) for goods and/or services

1.2 In this Agreement:

- 1.2.1 a reference to any gender includes a reference to other genders;
- 1.2.2 the singular includes the plural and vice versa;
- 1.2.3 the words "include" and cognate expressions shall be construed as if they were immediately followed by the words "without limitation";
- 1.2.4 references to any statutory provision include a reference to that provision as modified, replaced, amended and/or re-enacted from time to time (before or after the date of this Agreement) and any prior or subsequent subordinate legislation made under it;

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- 1.2.5 the expressions "subsidiary", "holding company" and "subsidiary undertaking" shall have the meanings given to them in the Companies Act 2006;
- 1.2.6 headings are included for ease of reference only and shall not affect the interpretation or construction of this Agreement; and
- 1.2.7 references to Clauses are to clauses of this Agreement.

2 Confidentiality obligations

- 2.1 In consideration of the Disclosing Party providing Confidential Information, at its discretion, to the Receiving Party, the Receiving Party shall:
 - 2.1.1 treat all Confidential Information as secret and confidential;
 - 2.1.2 have in place and maintain proper security measures and procedures to protect the confidentiality of the Confidential Information (having regard to its form and nature);
 - 2.1.3 not disclose or permit the disclosure of any of the Confidential Information to any other person without obtaining the prior written consent of the Disclosing Party or, if relevant, other owner or except as expressly set out in this Agreement;
 - 2.1.4 not transfer any of the Confidential Information outside the United Kingdom.
 - 2.1.5 not use or exploit any of the Confidential Information for any purpose whatsoever other than the Permitted Purpose; and
 - 2.1.6 immediately notify the Disclosing Party in writing if it suspects or becomes aware of any unauthorised access, copying, use or disclosure in any form of any of the Confidential Information.
- 2.2 The Receiving Party shall ensure that each Receiving Party Authorised Person to whom it discloses Confidential Information observes the Receiving Party's obligations under this Agreement as if such Receiving Party Authorised Person had undertaken the same obligations as the Receiving Party.

3 Permitted Disclosures

- 3.1 The Receiving Party may disclose Confidential Information to those of its directors, officers, employees, consultants and professional advisers and auditors (each a "Receiving Party Authorised Person") who:
 - 3.1.1 reasonably need to receive the Confidential Information in connection with the Permitted Purpose; and
 - 3.1.2 have been informed by the Receiving Party:
-

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- (a) of the confidential nature of the Confidential Information; and
 - (b) that the Disclosing Party provided the Confidential Information to the Receiving Party subject to the provisions of a written confidentiality agreement.
- 3.2 The Receiving Party and each Receiving Party Authorised Person shall be entitled to disclose Confidential Information to the extent that it is required to do so by applicable law or by order of a court or other public body that has jurisdiction over the Receiving Party or Receiving Party Authorised Person, provided that Clause 4 shall apply to disclosures required under the FOIA or the EIRs.
- 3.3 Before making a disclosure pursuant to Clause 3.2, the Receiving Party or relevant Receiving Party Authorised Person shall, if the circumstances permit:
 - 3.3.1 notify the Disclosing Party in writing of the proposed disclosure as soon as possible (and if possible before the court or other public body orders the disclosure of the Confidential Information); and
 - 3.3.2 ask the court or other public body to treat the Confidential Information as confidential.
- 4 Additional Permitted Disclosures by the Authority and other Government Bodies**
- 4.1 Where the Disclosing Party is the Organisation, the Authority and any Government Body to which Confidential Information has been disclosed in accordance with Clause 4.1.1, may disclose any of the Confidential Information:
 - 4.1.1 to another Government Body provided that the Authority or relevant Government Body informs the recipient Government Body of the confidential nature of the Confidential Information;
 - 4.1.2 pursuant to the requirements of the FOIA or the EIRs;
 - 4.1.3 to the extent the need for disclosure arises for the purpose of the examination and certification of the accounts of the Authority or relevant Government Body or for any examination pursuant to section 6(1) of the National Audit Act 1983 of the economy, efficiency and effectiveness with which the Authority or relevant Government Body is carrying out its public functions; and/or
 - 4.1.4 if the Authority or Government Body has reasonable grounds to believe that the Disclosing Party is involved in activity that may constitute a serious criminal offence and the disclosure is being made to a relevant investigating or enforcement authority.
- 4.2 The Organisation acknowledges that public bodies, including the Authority and other Government Bodies, may be required under the FOIA or the EIRs to disclose Information, including Confidential Information, without consulting or obtaining consent

from the Organisation. The Authority shall take reasonable steps to notify the Organisation of a Request for Information (in accordance with the Secretary of State for Constitutional Affairs' Code of Practice on the Discharge of the Functions of Public Authorities under Part 1 of the FOIA) to the extent that it is permissible and reasonably practical for it to do so but (notwithstanding any other provision in this Agreement) the Authority or other relevant Government Body shall be responsible for determining in its absolute discretion whether any Confidential Information and/or any other Information is exempt from disclosure in accordance with the FOIA or the EIRs.

- 4.3 The Organisation shall provide all necessary assistance and cooperation as reasonably requested by the Authority or relevant Government Body to enable the Authority or relevant Government Body to comply with its obligations under the FOIA and the EIRs.

5 Return of Information and surviving obligations

- 5.1 The Disclosing Party may serve a notice (an "Information Return Notice") on the Receiving Party at any time under this Clause 5.1. An Information Return Notice must specify whether it relates to (i) all Confidential Information provided by the Disclosing Party which is protected by this Agreement or (ii) only specified Information or categories of Confidential Information so protected (in either case, the "Specified Scope"). On receipt of an Information Return Notice, the Receiving Party shall:

5.1.1 subject to Clause 5.2, at the Receiving Party's option, securely destroy or return and provide to the Disclosing Party documents and other tangible materials that contain any of the Confidential Information within the Specified Scope, including in any case all copies of the relevant documents and other materials made by the Receiving Party and any Receiving Party Authorised Person;

5.1.2 subject to Clause 5.2, ensure, so far as reasonably practicable, that all Confidential Information within the Specified Scope that are held in electronic, digital or other machine-readable form ceases to be readily accessible (other than by the information technology staff of the Receiving Party or Receiving Party's Authorised Person) from any computer, word processor, voicemail system or any other device containing such Confidential Information; and

5.1.3 make no further use of any Confidential Information which falls within the Specified Scope.

- 5.2 The provisions of Clauses 5.1.1 and 5.1.2 shall not apply to the extent that the Receiving Party or Receiving Party Authorised Person is required to retain any such Confidential Information by any applicable law, rule or regulation or requirement of any competent judicial, governmental, supervisory or regulatory body or for the purposes of any audit.

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- 5.3 Following any destruction or return of Confidential Information to the Disclosing Party pursuant to Clause 5.1, the Receiving Party's obligations under this Agreement shall otherwise continue in force without limit of time.

6 General

- 6.1 The Receiving Party acknowledges and agrees that all property, including intellectual property rights, in Confidential Information disclosed to it by the Disclosing Party shall remain with and be vested in the Disclosing Party or relevant member of the Disclosing Party Group.
- 6.2 This Agreement does not include, expressly or by implication, any representations, warranties or other obligations:
- 6.2.1 to grant the Receiving Party any licence or rights other than as may be expressly stated in this Agreement;
 - 6.2.2 to require the Disclosing Party to disclose, continue disclosing or update any Confidential Information; or
 - 6.2.3 as to the accuracy, efficacy, completeness, capabilities, safety or any other qualities whatsoever of any Information or materials provided pursuant to or in anticipation of this Agreement.
- 6.3 The rights, powers and remedies provided in this Agreement are cumulative and not exclusive of any rights, powers or remedies provided by law. No failure or delay by either Party to exercise any right, power or remedy will operate as a waiver of it nor will any partial exercise preclude any further exercise of the same, or of some other right, power or remedy.
- 6.4 Without prejudice to any other rights or remedies that either Party may have, each Party acknowledges and agrees that damages alone may not be an adequate remedy for any breach by a Receiving Party or any Receiving Party Authorised Person of the provisions of this Agreement. Accordingly, each Party acknowledges that the Disclosing Party shall be entitled to the remedies of injunction and specific performance as well as any other equitable relief for any threatened or actual breach of this Agreement and/or breach of confidence and that no proof of special damages shall be necessary for the enforcement of such remedies.
- 6.5 For the purposes of the Contracts (Rights of Third Parties) Act 1999 no one other than the Parties has the right to enforce the terms of this Agreement.
- 6.6 Each Party will be responsible for all costs incurred by it or on its behalf in connection with this Agreement.
- 6.7 This Agreement may be executed in any number of counterparts and by the Parties on separate counterparts, but shall not be effective until each Party has executed at

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least one counterpart. Each counterpart shall constitute an original of this Agreement, but all the counterparts shall together constitute but one and the same instrument.

- 6.8 To the extent that there is any conflict between this Agreement and the Tender Documentation in relation to Confidential Information which is the subject of confidentiality provisions under both, the Party's rights, duties and obligations under the Tender Documentation shall prevail.

7 Notices

- 7.1 Any notice to be given under this Agreement (each a "Notice") shall be given in writing and shall be delivered by hand and shall be deemed to have been duly given at the time of delivery provided that such Notice is sent to the relevant physical address, and expressly marked for the attention of the relevant individual, set out in Clause 7.2.

7.2 Any Notice:

- 7.2.1 if to be given to the Authority shall be sent to:

West Berkshire Council
Council Offices
Market Street
Newbury RG14 5LD

Attention: Sarah Clarke, Interim Head of Legal Services

- 7.2.2 if to be given to the Organisation shall be sent to:

Carter Jonas LLP
One Chapel Place, London, W1G 0BG

Attention: Steven Sensecall, Partner

8 Governing law

- 8.1 This Agreement shall be governed by, and construed in accordance with, English law and any matter claim or dispute arising out of or in connection with this Agreement whether contractual or non-contractual, shall be governed by and determined in accordance with English law.
- 8.2 Each Party hereby irrevocably submits to the exclusive jurisdiction of the English courts in respect of any claim or dispute arising out of or in connection with this Agreement.

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IN WITNESS of the above this Agreement has been signed by the duly authorised representatives of the Parties on the date which appears at the head of page 1.

For and on behalf of the Authority

Signature:

Date:

Name:

Position:

For and on behalf of the Organisation

Signature:

RClayton

Date:

22.11.19

Name:

JOHNNY CLAYTON

Position:

PARTNER .

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APPENDIX 4: FEE SCHEDULE

