



SOG Limited

# Fusion Report

## CATALOGUE NUMBER 2.25



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THE FUSION PROCESS  
Delivering the Heath Park Vision

## THE FUSION PROCESS

### Delivering the Heath Park Vision

This report describes the Fusion Process that was used to deliver the new vision for Heath Park. This is a unique process developed by SOG specifically for the purpose of developing real estate for investment.

The findings of this report result from independent external observation and action research on the application of the process for the development of the Heath Park Masterplan and investment portfolio.

The report concludes that the process is robust and extremely thorough both in delivering a programme of work and in ensuring that the attributes of the project are captured at the onset to deliver value in a systematic and data rich manner, and to ensure that the plans are achievable and will deliver the ambition and the vision for Heath Park going forward.

Professor Rachel Cooper OBE  
Louise Mullagh  
Lancaster University  
and  
John Firr, consultant.  
February 2022



## THE HEATH PARK VISION

Before describing the Fusion Process, it is important to state the vision for Heath Park:

*To put people first and create a futuristic model of Merseyside's Port Sunlight in order to meet the needs of tomorrow, a place where people of all ages can live work and play together in a carbon neutral environment, one that has strong community links and that is safe, secure and combats loneliness.*

The detailed objectives and strategy of this vision were developed through the early stages of the Fusion Process.

## THE FUSION PROCESS – what is it?

The process of designing and delivering real estate, whether that is through a regeneration project or a new development, has never been consistently defined and therefore managed in an appropriate or systematic way, and there are a multitude of theories and practices. These tend to come from a diversity of professions and disciplines engaged in making places, from real estate companies and property investors to architects and urban planners. As a consequence, the Fusion Process was developed by SOG Ltd to ensure that projects undertaken by them deliver a defined vision against business drivers in a systematic and consistent manner.

The name Fusion denotes the imperative of combining all the parts of the process together at the onset of a project. Blending the skills of a multi-disciplinary team, whilst applying broad horizon scanning to gather knowledge, evidence and insight to deliver a cohesive and creative solution, results in a project that is greater than the sum of the parts.

The Process was developed based on the successful regeneration of The Heath in Runcorn and deployed when developing the Sanofi facility in Dagenham, London, into what was to become known as London-East Park. The front-end stages of the process were also deployed on facilities belonging to ICI Pharmaceuticals, Astra Zeneca, Sanofi in Fawden and University College London.

The typical approach to land development involves treating the site merely as an asset of value. This approach essentially ignores the people, economy, and environment in which the site sits. It can often result in a "one size fits all" suboptimal solution. The Fusion Process seeks, through evidence and data, to find the optimum solution to the future of the site in a collaborative way, by treating the real estate and land as part of a wider economic, social and environmental system.

Fusion as a process is focussed on finding the best way to deliver a vision from a real estate perspective. The whole process is aimed at keeping the vision and values in focus throughout the development process, understanding the context, the history, and the decision-making, to ensure the eventual legacy is consistent not only with the site's past, but also with the values of the future. All this is done at the same time as ensuring it aligns with the business imperative.

The Fusion Process is a five-stage model that has evolved with experience and is informed by practice in its use. It is comprised of the following stages:

**Stage Zero:** Trigger, this stage sets the scene and influences the philosophy of an entire project.

**Stage One:** Scouting, this investigates options and explores the art of the possible

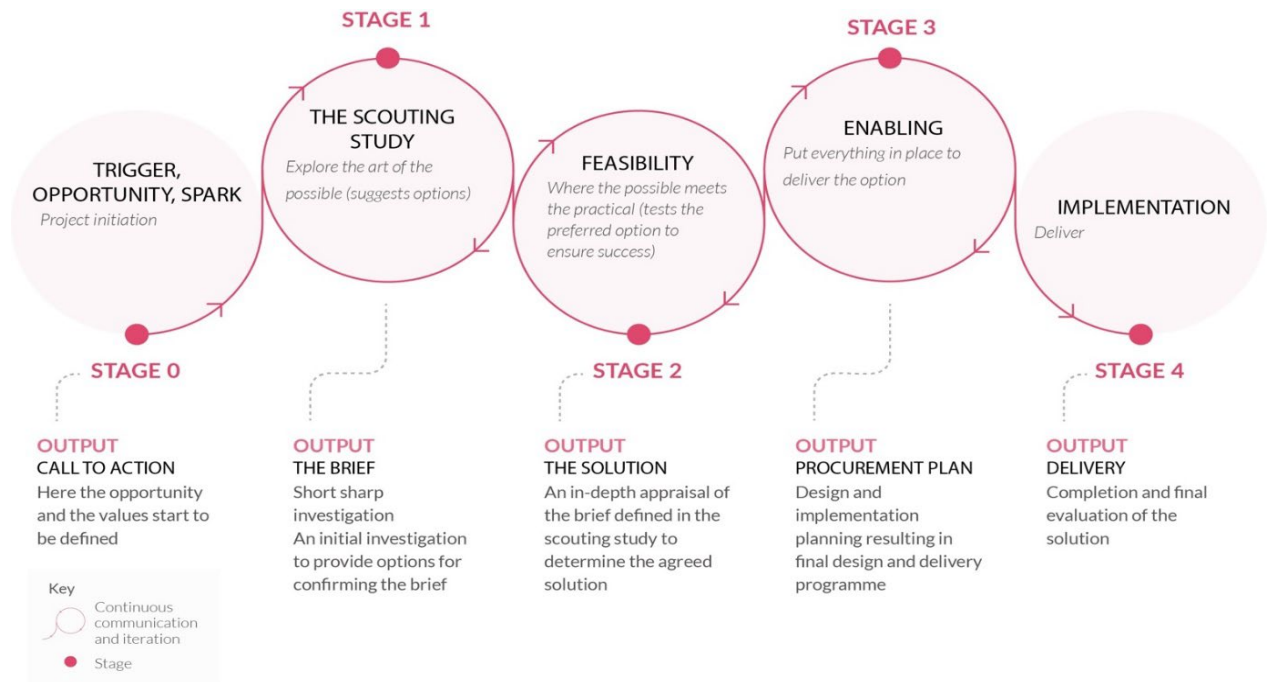
**Stage Two:** Feasibility, an in-depth appraisal of the brief defined in the Scouting Study

**Stage Three:** Enabling, putting everything in place to deliver the vision.

**Stage Four:** Implementation, delivering the vision within the business context

The process is not linear, and each stage may be subject to review and transition and be iterative, depending on the needs of the project and continuous review. For some clients, only stages 1 and 2 were carried out to then inform their own internal project planning processes.

Figure 1: The Fusion Process



## THE FUSION APPROACH TO HEATH PARK - How was it applied?

The Fusion Process was applied to the development of Heath Park by SOG Ltd, led by the Managing Director John Lewis, supported by a dedicated and specially selected team (The SOG team, listed in the appendices\*), that included both SOG staff and external consultants.

**The Process has two specific strands that are core to the delivery of the project. A rigorous project and programme management system and a method of developing the vision and maintaining the integrity of that vision through to implementation.**

A brief description of the process as applied to the Heath Park project is set out below:

### Stage Zero – Trigger, Opportunity, Spark

*Trigger: All projects start with a trigger, which stimulates thinking and challenges the status quo.*

In the case of Heath Park, it was John Lewis listening to a speech on the environment and climate change by Andy Burnham, Mayor of Manchester. The trigger leads to exploration, horizon scanning and debate, opening the thinking to the context and opportunities available.

*Opportunity: Opportunities often propel the search for ideas forward.*

In the case of Heath Park, the opportunity arose when Halton Bough Council proposed a change in land use classification. This then triggered a move to engage the Royal Institute of British Architects (RIBA) to organise an international design competition (Scouting study), the aim of which was to bring forth innovative and inspirational ideas for future living, exploring potential opportunities that could be used as an exemplar for other developments.

*Burning Platform (Spark): This is the point at which an imperative or driving force stimulates action to move forward.*

At Heath Park, the Spark was the point at which Steve Rotherham, Metro Mayor said he would back the project as a Liverpool City Region (LCR) Beacon Project and promote it at MIPIIM 2020. This was the spark to propel the project forward. Even though the scoping stage had begun, it built in a level of impetus to move at pace.

### Stage one – The Scouting Study

*A short sharp investigation to provide options for confirming the brief and explores the art of the possible. Traditionally, in most projects this step is omitted, yet research suggests that exploring this front end of project development is critical, it results in better solutions and more successful delivery. This front-end work is central to the Fusion process, with evidence and data gathered by the SOG Team, which is then synthesised to allow a range of options to be identified. The output from this stage is the Feasibility Study Brief.*

The Heath Park Scouting Study began in October 2019 by SOG engaging the RIBA to run an international ideas competition for future living at Heath Park. The RIBA worked with the SOG team to appoint judges and an advisory group (listed in the appendices\*). This group worked with the SOG team to develop the competition brief (appendix 3)

John Lewis's original thoughts were of creating a modern-day version of Port Sunlight. He recognised that Heath Park's greatest asset and his legacy to the site would be people: the purpose of the competition was to invite ideas of how Heath Park should function in 2050; where it would be a great place to work, and a happy, healthy place for all ages to live. It was to explore the principles of the future workplace and living space and provide the SOG team with international insights into a whole host of concepts and ideas from a diverse range of architects, designers, and related professionals.

The RIBA supervised the competition and the process for scoring the proposals, stage one of the competition resulted in 45 submissions which were evaluated in early 2020. The criteria for the assessment were:

- Overall quality of the design approach 40%
- Response to the brief including: 40%
  - i. benefits to employment opportunity
  - ii. benefits to community, health and wellbeing
  - iii. benefits to the environment
- Creativity and innovation 20%

Eight proposals for further work were selected by the advisory group against the competition criteria. These submissions were evaluated and three proposals selected, and the consultancies were then funded to provide more detailed submissions over the summer of 2020. During this period these companies had access to the SOG team and the site. The final selection of a consultancy was by interview and presentation in October 2020, at which point Eco Responsive Environments (ERE) were selected to move the project forward into Stage Two Feasibility by developing a masterplan.

This RIBA process provided the SOG team with the opportunity to explore all the issues behind creating a new type of place. That is to identify the social, environmental and economic and governance issues, to define the opportunities and thus to clarify SOG's own objectives for the vision of Heath Park.

### Stage Two – Feasibility

*Feasibility is comprised of an in-depth appraisal of the brief defined in the Scouting Study to determine the preferred solution. This is where the art of the possible meets the practical and tests the preferred option to ensure success. The output from this stage is the Solution.*

Feasibility for Heath Park began with the development of the Feasibility Brief (see appendix 4) by the SOG team and advisors. This was issued to ERE in February 2021 along with a programme and timelines for final submission. ERE were instructed to bring together the full team of advisors to deliver the masterplan and associated reviews and documentation. The brief was informed by the Scouting Stage. At this point SOG had seen in all the competition submissions, opportunities to enhance the site and deliver against environmental, social and economic drivers. For instance, they included in the Feasibility brief the need for the inclusion of a vertical farming facility (an idea seen in the RIBA competition). Whilst ERE undertook the feasibility work on this, SOG in parallel undertook further scoping and investigation work on Vertical Farming as a commercial and environmental opportunity for the site.

The Feasibility programme was monitored weekly (through traditional project and programme methods) by the full SOG team including John Lewis. At the same time, ERE were managed through weekly liaison with Terry Rogan, SOG's consultant Architect, whilst Prachi Rampuria and the ERE team were mentored on the delivery of the Heath Park vision by Professor Rachel Cooper. Design and progress reviews occurred weekly, depending on the needs of the ERE or SOG teams to review design decisions, whilst more formal full team reviews of the proposals took place every three or four weeks. Multiple stakeholders and advisors were brought together to inform critical decision-making, for example on plots and land use systems, car usage and community ownership systems. All of these were used to test the designer's interpretation of the values embedded in the Feasibility Brief. ERE provided the client with a values table illustrating how they were designing solutions to address all the critical social, environmental, economic and governance requirements set out in the brief. The final masterplan was presented and recorded 15 June 2021. Following this, the documentation was further developed in collaboration with SOG.

This process of monitoring the programme systematically and ensuring that ERE could work towards delivering the vision in the context of the commercial and business environment, was critical to achieving the objectives of the Feasibility Stage. The work undertaken was rigorous, constructive, and systematic in approach, whilst also being iterative and collaborative.

### Stage Three – Enabling

*Enabling is comprised of the practical steps to put in place everything to begin the implementation process.*

The final objective for the Heath Park Project was the delivery of the investors pack, with everything in place to ensure the integrity of the vision for the project was clear and all dimensions of that vision were defined, enabled and maintained for the preferred investor. The conclusion of the project was to enter into an exclusivity agreement with a preferred investor. Therefore, Enabling comprised undertaking the necessary preparations for the full investors pack. This included two important tasks:

- 1 Determining the best way to communicate to potential investors the vision behind Heath Park, and to ensure they could understand and buy into that vision and ethos.
- 2 To prepare everything to ensure the delivery of the vision/masterplan for Heath Park was as smooth as possible for the investor.

### Transition from Feasibility to Enabling

Although the Feasibility stage had involved robust analysis of the deliverability of the masterplan created by ERE there remained several points that the SOG team wished to test and define further. These included:

- 1 How to demonstrate value robustly, which involved GRESB assessment of the masterplan as it would be delivered. This was independently assessed
- 2 Assessment of social return on investment. This was independently assessed
- 3 Further visualisations and new artist impressions.
- 4 Further assessment of Clean Energy and the provision of renewable energy alongside a memorandum of understanding from HyNet.
- 5 Further assessment of the Vertical Farm proposal, to prove that once located at the site it would achieve Net Zero Carbon status. This was achieved through SOG funding a full pilot growth cycle in a plant at the site powered by hydrogen.
- 6 Pre-Application approval from the Local Council.

All the above was achieved by the SOG team with further external professional service provision.

### Enabling

Full Enabling involved structuring all the relevant data and information into a clear investors pack, alongside evaluation of the financial model, establishing the legal and tax factors, determining the nature of a preferred deal, and finally undertaking ongoing communication with critical stakeholders at international, national, and local levels. A major aspect of this was being selected as one of two projects from the North West of England by the Department for International Trade to be included in the UK's Global Investment Atlas (2021). This gave the SOG team the impetus to accelerate Enabling activities and to rehearse the communication requirements to enable them to effectively convey the Heath Park Project vision to politicians, high level stakeholders and investors, as well as ensure the current Heath Park community were part of that open communication.

The Investors pack was structured around;

- i) Vision; including the ethos, objectives and outline masterplan,
- ii) Fusion; involving appraisal of the development process,
- iii) Feasibility Study; bringing all the research, attributes and design proposals together into the masterplan,
- iv) The Sale Offer and Share Deal; describing the structure of the offer and the components of the entire project,
- v) Support; illustrating the comprehensive support for the project, where elimination of any obstacles has been overcome,
- vi) Pre-planning approval, with associated documentary evidence of pre-planning approval,
- vii) Financial Validation; illustrating the detailed and independent analysis that established commercial viability, potential GRESB rating and ESG rating.



- viii) Vertical Farming; findings from the pilot project illustrating that the vertical farm operating within the park will be carbon negative, consuming more CO2 than it produces.

The investors pack is concluded with a final statement and full appendices related to the above points. It was designed to be accessible as a completed document and in sections to enable potential investors to source specific documents they required.

#### Stage Four – Implementation

*Implementation is the process by which the objectives of the project are delivered.*

In the case of Heath Park, Project Implementation is the assembly of the investors pack, and the development of an Investor Screening questionnaire. This questionnaire was developed to ensure investor alignment to the SOG objectives for Heath Park and the potential investor's ethos, that is their compatibility with the values embedded in the Heath Park Project and receptiveness to the vision as presented by the masterplan. The aim of which was to select the best possible investor to achieve the vision.

*The Heath Park Project has passed through the five stages of the Fusion Process. These are the critical stages for defining and planning the delivery of the vision. These stages were undertaken in a rigorous and critical way to ensure the plans are achievable and will deliver the ambition and the vision for Heath Park going forward.*

## EVALUATION OF THE FUSION PROCESS - What makes it work?

The Fusion process places emphasis on the importance of the 'front-end' process of site re-development and considers more than the sale of land, building and assets. The following key elements have been fundamental in the development and implementation of this process at Heath Park:

### *Process Management and Development*

Traditional project and programme management techniques were in place to ensure a disciplined approach to the programme and were enhanced by very close monitoring and action by the whole SOG team. This enabled creative, agile, and flexible decision-making and response to challenges, and led to the ability to make rapid change without losing sight of the objectives and the vision. It also enabled a comprehensive record to be maintained and retained of individual task development and decision making.

### *Team Building*

John Lewis built a team of trusted professionals by selecting people he believed had talent and who understood the desired objective, the operational culture, and the flexibility of the operation. Roles and tasks were defined as required by the project. The core SOG team was enhanced from the onset by an architect advisor, a process and programme advisor, a communications consultant, and other specialists as required, all of whom had worked with John and SOG on a number of Fusion programmes.

### *Communication*

A key element of the Fusion process is communication, both within the team and with wider stakeholders. Embedding this into the process and making the mechanisms and processes explicit forms a vital part of Fusion. It also forms the basis of ongoing engagement with and support from a wide range of stakeholders.

This was embedded within the scouting and feasibility stages for Heath Park, ensuring that the development was both informed by and conveyed to key stakeholders such as the Local Authority or potential businesses, who wished to become part of the development.

### *Culture and Leadership Style*

The culture of the project is critical, no matter how robust the Fusion process. Indeed, there is obviously an interrelationship between the development and implementation of the Fusion process and its application on SOG projects. The culture of the organisation is informed by the leadership style of the managing director John Lewis, which is open, discursive, agile, rapid and collaborative. The process then relies on each individual's talent, allowing it to flourish whilst being focussed on delivering the overall vision. Confidence and decision-making are also important, whilst establishing the right team with the skills and energy to deliver the project is critical.

It is clear from the observation of the Fusion process for Heath Park that values were communicated from the start, between all organisations. This was vital to ensuring the 'front end' scouting process was successful and led to an effective Feasibility brief and its implementation. Common understanding of the vision, values and objectives were essential, and much time and effort was placed on this activity, to ensure not just the SOG team but all companies, stakeholders and partners understood and were committed to achieving the purpose of the programme. Thus, when conflict or diversion from the objective arose, this was addressed through redirecting all parties to the original purpose.

### *Innovative Contracts*

Flexibility and agility were not only applied to the process and decision making but also to the delivery of the project through identifying the most appropriate form of contract that delivered the objective.

### *Business Realism*

In order to deliver social and environmental values, they must be grounded in economic and business logic and evidence. The Fusion process combined the space for collaborative creativity, social

responsibility and environmental innovation to be rigorously tested against business assessment, through constant testing of design and planning assumptions in the context of potential investment and achieved value.

## CLOSING MESSAGE – why is it important?

This review of the Fusion Process as applied to The Heath Park project illustrates the discipline that has been applied to the programme of work. There is behind this report an archive of programme and design documentation that records how the project has been managed and the integrity of the vision maintained throughout the design of the masterplan.

The values established at the onset of the project, were defined through the various briefing documents, but importantly tested, challenged and enhanced through the programme of work. These values are often intangible but whilst working through the process they are interpreted and translated into tangible assets that are then tested against a business case for both the present and the future. This rigour is critical to ensuring that the vision is valid and provides a basis for ensuring the project is realisable going forward.

## Appendices

## 1 SOG TEAM\*

John Lewis, MBE, Managing Director  
Terry Rogan, Architect  
Simon Lewis, Programme Manager  
Ryan Lewis, Site Project Manager  
Mick Noone, Development Director  
Tim Metson, Chartered Surveyor  
Paul Smith, Head of Communications  
Lesley Banks, Sales and Marketing Manager

## 2 RIBA JUDGING AND ADVISORY PANEL

Hugh Broughton, RIBA Hugh Broughton Architects, RIBA Adviser  
Paul Monaghan, RIBA Allford Hall Monaghan Morris, Liverpool City Region Design Champion  
Professor Rachel Cooper, OBE Lancaster University  
John Lewis, MBE Managing Director of SOG Ltd  
Terry Rogan, RIBA Terry Rogan Architect  
Joanne Wallis RIBA Competitions (Observer only)\*

## 3 BRIEF FOR SCOUTING STUDY (RIBA COMPETITION)

*This is an extract from Heath Park Open Ideas Competition RIBA brief document*

### PHASE ONE WILL CREATE 'A VISION OF THE FUTURE'

The competition will initially ask for non-site-specific, purely conceptual ideas on the design of future workplaces, living spaces and external spaces and how they relate to one another. They do not need to relate specifically to HEATH PARK. The sponsor is interested in ideas which promote health and happiness and help to eradicate loneliness and poverty, but particularly interested in views on how future technologies will play their part.

The context in which any 'Vision of the Future' lies is therefore one of significant challenge. We know we need to create places that are resilient to climate change and deliver individual and community health, wellbeing and prosperity. Therefore, such Visions need to consider the social issues that are recognised internationally of:

- an ageing population where isolation is common, including the increasing costs of health and social care;
- the causes and possible remedies of growing obesity rates amongst children and adults and the growth of non-communicable diseases such as cancer, heart disease and poor mental health across the life course;
- the importance of addressing inequality and poverty in communities.
- the impact of crime and security on neighbourhoods

At the same time, we must recognise the impact of climate change on our infrastructure, and on the need to reduce our carbon footprint, be more energy efficient and secure our resources, such as the availability of food.

The evidence suggests that if we increase our use of green infrastructure, encourage physical exercise and engagement with the natural and social world, consider new modes of transport and accessibility, we can make places more sustainable and liveable, with resulting benefits on the individual and their community.

Whilst future Visions must consider these factors, they must also importantly consider the emerging technologies that are already influencing our lives. We are increasingly living in digital worlds, engaging socially and commercially on-line. On the horizon, pervasive technology such as the internet of things, smart materials, new battery systems, robots supported by autonomous decision-making through AI and machine learning, all present intriguing new possibilities and challenges. Science and technology present us with quite limitless opportunities for the design of new places and systems but we do need to consider what their effects will be both positive or negative, and also how our privacy and security will be maintained and trusted. We must consider how the spaces we create for homes, education, work and social life will contribute to happier, healthier and prosperous lives.

Designs should consider how suitable future technologies and energy use will be harnessed to facilitate well-being (need for consistency in spelling of well-being or wellbeing – see 2<sup>nd</sup> para above, extending to ways of reducing consumption and waste.

## 4 BRIEF FOR FEASIBILITY STUDY

### HEATH PARK FEASIBILITY

Final: 12 Feb 2021

#### 1) INTRODUCTION

- a) The SOG team would like first of all to congratulate EcoResponsive Environments on their competition-winning submission which intelligently interpreted a wide-ranging brief and provided a sketch map of the future route the Heath Park Project will follow. It is now time to prove it can be done! Other aspects of the project have of course been proceeding apace and the team are ready to commence the next stage of our development process and invite you on board.
- b) The project has attracted a lot of interest and solid contacts are developing with highly-placed figures and groups in government, business and the media significantly because of the objective and guiding principles adopted at the outset, and it would be useful to review these;
  - i) Objective:
    - (1) Find a suitable investor(s) or buyer(s) to carry forward our vision of a futuristic Port Sunlight<sup>1</sup>
  - ii) Guiding Principles:
    - (1) avoid concern, or create business interruption, for staff and residents.
    - (2) ensure SOG staff are treated correctly and fairly.
    - (3) ensure a fair return for Land and Property.
    - (4) an environment where people can "Live, Work and Play".
    - (5) leave the desired legacy (basically the development of the site resulting in the delivery of a futuristic Port Sunlight)<sup>2</sup>
- c) Our project development process (used successfully over the years on projects around the UK) is called Fusion and a brief description is provided in the preamble to the draft Scouting Study (Appendix A). Every project is different and requires adjustment of tasks and definitions which, for Heath Park, are provided in Appendix B. Please acquaint yourselves with these. As a separate exercise, Prof Rachel Cooper will be monitoring our progress with a view to providing validation of the decision processes followed by the team.
- d) This document and attachments will therefore describe what we would like EcoResponsive Environments to contribute in order for you to provide a fee framework.

#### 2) THE MASTERPLAN

- a) Your submission report described how Heath Park could provide sustainable conditions for health and well-being (well-being or wellbeing – need for consistency by;
  - i) Creating jobs in the training, construction, use and management of buildings,
  - ii) Social participation (and therefore investment and curation) in masterplanning,
  - iii) The use and experience of natural systems (eg in water management),
  - iv) The maintenance of a social and ecological balance in the use of buildings and land,
  - v) Introducing the Arts to the Heath Park asset creating a STEAM culture (in line with (better than?) "Building Better, Building Beautiful") and the management strategy required,
  - vi) Selection of energy sources for heat and power networks,
  - vii) Physical and digital connectivity (see also Halton BC Planning comments on connectivity for the North Site Appendix C),
  - viii) Waste management and the possibilities for circular systems,
  - ix) Designing suitable ownership and management strategies.
  - x) Phasing implementation of the scheme to smooth investment cash flow.
- b) To the above we would like to add the development of your proposal for a Vertical Farming facility into an anchor industry for the Project, and therefore of large scale (see draft Scouting Study Report Appendix A). There are synergies with both the existing Research and Technical facilities and the environmental aspirations of the Project which we would like you to explore. Note that some operators we have approached would prefer to use re-purposed structures than build new. We expect there to be a distinct investor/operator for this facility which can't be identified at this time and which limits determination of an exact scale and type of operation. We would therefore like you to assume for current purposes a facility of 5,000m<sup>2</sup> (based on the Scouting Study and your own previous research) for stage 1 (see below)

for review before commencing stage 2. Note you are not required to design the facility in detail but to propose its location, suggest construction method and materials, consider its infrastructure requirements, and examine how it could interact (physically, ecologically and socially) with the overall Heath Park scheme. Illustrative plans, sections, and elevations will be required to explain the proposed facility to investor/operators, and also to provide the basis of costing.

- c) The team was pleased to see the traffic-calming device proposed between the main and north sites but would like to discuss a more obvious connection between this and the central boulevard.
- d) The progress of some elements of this feasibility study will necessarily be iterative and it would seem sensible to define stages at which output can be reviewed. The following are suggested;
  - i) Stage 1:
    - (1) Energy, heat, power, water and waste strategies which rely on existing (or, in the case of hydrogen, planned) networks and topography,
    - (2) Environmental, physical and social connectivity (within Heath Park and also the wider Runcorn context),
    - (3) Land and building uses informed by the above and where/how the VF facility is incorporated,
    - (4) Preliminary illustrative sketches of masterplan and building proposals (plans, sections, elevations),
    - (5) Social participation / consultation: suggestions on what and when for agreement with the team,
    - (6) A preliminary commercial assessment. The format for this will be provided shortly.
  - ii) Stage 2:
    - (1) Phasing strategy to maximise early gains,
    - (2) A detailed masterplan,
    - (3) Illustrative plans, sections and elevations of the principle building types and land treatments proposed,
    - (4) A “design guide” to prescribe;
      - (a) Social and ecological strategy,
      - (b) STEAM input
      - (c) Fractal approach to construction strategies and methods, in turn defining materials and MMC
      - (d) Ownership and management strategies
    - (5) A detailed commercial assessment in the format provided in stage 1.  
(it is intended that items 2, 3, and 4 will be the basis of a joint statement of intent with Halton BC)
  - iii) Stage 3:
    - (1) Presentation material e.g. images, film, etc... as determined by PR and investment market needs. SOG will manage all PR: any approaches from and announcements to media are to be channelled through SOG.
- e) Stage 2 is scheduled for completion 28 May.

### 3) THE OBJECTIVE

- a) This must be kept in mind throughout. It has been explained that SOG cannot carry this project forward themselves and will use the Enabling phase of Fusion to seek investors/buyers to take over the Project and implement it. It is therefore crucial that cost is definable with enough detail and accuracy to allow a realistic assessment of the commercial viability of the scheme. We will need;
  - i) NIA and GIA figures for the various building uses,
  - ii) Costs for the various building types and land treatments,
  - iii) Initial assumptions for CIL and possibly S106 agreements (these will be discussed with Halton BC during the Feasibility study period).
- b) The output of this Feasibility Study will be the main element of the pack presented to investors and it is important that, as well as demonstrating its commercial viability, some protections of its ethos and balance are built in and we will discuss these with you as the study proceeds. We see the following strategies as candidates;
  - i) The masterplan and accompanying illustrative material forms the basis of a joint statement of intent with Halton BC,
  - ii) Tenure mix agreed with Halton BC,
  - iii) Materials palette and construction strategies (eg MMC) also agreed with Halton BC,
  - iv) Validation of the sustainability credentials of the scheme by GRESB (Global Real Estate Sustainability Benchmark) which will also serve to provide introduction to investors sympathetic to the ethos of Heath Park through the increasing importance of Environmental and Social Governance in finance.



- v) High level PR endorsements which can provide a measure of political protection to quality (ie risk of bad PR if standards are lowered).

#### 4) YOUR PROPOSAL

- a) This will be a “package deal” including the services of other consultants needed to complete the tasks above. There will be one appointment between SOG Ltd and EcoResponsive Environments using an agreed RIBA form stating your fees for stage 1 and an estimate of fees for stage 2. Stage 3 requirements are yet to be determined.
  - b) Include your proposed consultant team and reporting structure.
  - c) Include weekly progress reports
  - d) Provide an estimate of expenses and disbursements for stages 1 and 2.
  - e) Given that stage 2 is scheduled for end of May, please provide a date for completion of stage 1.
  - f) Please also include a statement of your understanding of this brief and its aims.
- 

<sup>1</sup> Note: not a copy of Port Sunlight, but an updated and future version of the enlightened principles of community, health and wellbeing, and employment.

<sup>2</sup> Legacy can be defined as embodying the following.

- Continuance of an employment base with community connection
- At least carbon neutral
- Putting the health and wellbeing of people first

## **FURTHER INFORMATION**

### **Heath Park Property Specialist**

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## **FURTHER INFORMATION**

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