

Lancaster City Council

Local Plan Review

Sustainability Appraisal and Habitats Regulation Assessment Project Brief

January 2024

1. INTRODUCTION

- 1.1 Lancaster City Council adopted its current Local Plan in July 2020. The new Plan consisted of a Strategic Policies & Land Allocations Development Plan Document (DPD) and a revised Development Management DPD. The adopted Local Plan sets out a detailed planning framework for the district, making strategic decisions on a range of matters including the quantum and location of new development and evolving a suite of planning policies to guide new development.
- 1.2 On adoption of the Local Plan in 2020, the City Council immediately embarked on a Partial Review; its specific focus being the strengthening of policies to address the implications of Climate Change at a local level and the ambitions of the Councils Climate Emergency declaration of January 2019. This Partial Review remains ongoing albeit in its latter stages, with a Public Examination in late 2022 and adoption anticipated in Spring 2024.
- 1.3 Parallel to work which is ongoing with the Partial Review, in September 2023 the City Council resolved to commence a full and comprehensive review of the Local Plan in light of a number of material changes in circumstances which have taken place locally since its original adoption.
- 1.4 Firstly, the anticipated levels of growth anticipated in the adopted Local Plan, particularly in South Lancaster through the delivery of Bailrigg Garden Village, have suffered a significant set-back through the suspension of the South Lancaster Growth Catalyst. This resulted in the loss of in the region of £140 million of investment in road and transport improvement in the South Lancaster area, placing a considerable challenge of the wider delivery of Bailrigg Garden Village. As part of the decision to commence the Full Review of the Plan, the Council also decided to cease work on proposals for a new Garden Village in South Lancaster.
- 1.5 Secondly, there has been a persistent under-delivery of housing within the district placing great pressure on the Council's 5-year housing land supply position. Whilst some of the factors which have led to such pressure have arisen from factors outside of the Councils control (for instance the COVID 19 Pandemic and wider economic volatility at a national level) it is nevertheless incumbent on the Council to address this under-delivery through the appropriate actions which the Council believe to be a full review of the Plan.
- 1.6 As part of this work the City Council seeks to commission consultants to undertake the Sustainability Appraisal (SA), Strategic Environmental Assessment (SEA) and Habitats Regulation Assessment (HRA) as required during the preparation and assessment of a new Local Plan for the District. The SA assessment will be required to incorporate the SEA and SA requirements into a single assessment process, hereafter referred to as SA.
- 1.7 The City Council is aware that the Government are looking to streamline the environmental assessment regime replacing the SEA and Environmental Impact Assessment (EIA) process with a single assessment, an Environmental Outcomes Report (EOR). The exact details of this including any transitional arrangements are still outstanding with secondary legislation required. The Council is mindful that the Local Plan is being prepared during a period of significant change which may, depending on the transitional arrangements, impact the preparation of the Local Plan which is due to commence in 2024. The Council would expect tenders to reflect this consideration, with tenders future proofed to ensure that any transition to a new environmental assessment regime is covered.

- 1.8 The successful consultants will be procured on a retained basis to undertake all SA and HRA work required for the preparation, assessment and examination of the reviewed Local Plan. The potential attendance and giving of evidence at Examination is to be included within this. Whilst the ability to do this is to be considered within the tender the commissioning of this stage of work, should it be required, is outside of the scope of this commission. Hourly costings of key personnel for this should be provided.

2. THE CLIENT

- 2.1 The City Council is looking to procure work under its role as Local Planning Authority for the District. The project is being commissioned by:

Planning and Housing Strategy Team
Planning and Climate Change Service
Lancaster City Council
PO Box 4
Town Hall
Lancaster LA1 1QR

3. BACKGROUND

Background

- 3.1 Lancaster City Council is the Local Planning Authority for Lancaster District. Within this role the City Council is charged with producing a Local Plan for the District. The Local Plan for the District currently consists of several Development Plan Documents:
- Strategic Policies and Land Allocations DPD and Local Plan Policies Map.
 - Development Management DPD.
 - Central Morecambe Area Action Plan.
 - Arnsdale and Silverdale Area of Outstanding Natural Beauty (AONB) DPD.
- 3.2 Together these documents provide the planning policy framework for the district. There are also a number of areas which have been designated for the purposes of neighbourhood planning, with a number of plans now adopted and others which remain under preparation.
- 3.3 On adoption of the Local Plan in July 2020, the City Council immediately embarked on a Partial Review; its specific focus being the strengthening of policies to address the implications of Climate Change at a local level and the ambitions of the Councils Climate Emergency declaration of January 2019. This Partial Review remains ongoing albeit in its latter stages, with a Public Examination in late 2022 and adoption anticipated in Spring 2024. The Council currently awaits the Inspectors Report which has been delayed to allow for further consideration of the ability of local authorities to set their own energy performance standards for new residential development. The Inspector has indicated that she is of the view that local authorities cannot set such standards with this prohibited by the 2015 Written Ministerial Statement on this subject. The Council await her final conclusion on this. It is anticipated that the adoption of the Partial Review will take place in Spring 2024.
- 3.4 With the Partial Review still in preparation, the 2020 Local Plan remains the adopted policy position for the District. The adopted Local Plan set out an ambitious vision for the district but, since its publication in 2020, it has been subject to a number of challenges outside of its control, particularly

around the delivery of strategic development sites. This has led to the Council taking the decision to commence a Full Review of the Local Plan. As a Full Review, it will revisit a range of strategic issues that will include (but is not limited to) matters of housing, employment, climate change, design and the natural environment.

- 3.5 The decision for the Full Review was based on two factors. Firstly, a material change in circumstances relating to the delivery of strategic infrastructure in South Lancaster, specifically Lancashire County Council's decision to suspend work on the South Lancaster Growth Catalyst and its associated transport infrastructure projects. This has led to the City Council ceasing work on the preparation of the Lancaster South Area Action Plan DPD which was to provide the planning policy framework for growth in this area including the Bailrigg Garden Village. And, secondly, largely because of delays in advancing strategic development sites, the delivery of housing has been below that which was projected at the time of the Local Plan's preparation.
- 3.6 Both factors, when viewed in the context of the Local Plan Review Mechanism (Policy LPRM1 of the Strategic Policies and Land Allocations DPD), mean that the Council has little alternative other than to commence a full review of the Local Plan.
- 3.7 The decision to undertake a full Local Plan review is not an insignificant undertaking. It will involve a reconsideration of all the strategic components of the adopted Local Plan. This includes establishing new development requirements over a new Local Plan period, including for housing and employment. Once new development requirements have been established then the Council will have to develop a spatial distribution strategy – that will establish broadly where development will be directed, and then allocate specific areas of land for development to enable that strategy to be achieved.
- 3.8 Whilst undoubtedly a challenge, the review also represents a positive opportunity to re-visit the content of the currently adopted Local Plan, in light of changing circumstances, new information and updated evidence. This includes the opportunity to take account of changes in national, regional, and local circumstances to ensure that the new plan reflects the Council's ambitions as well as its obligations as a local planning authority.
- 3.9 Due to delays in the publication of the Inspector's report the full review will commence in advance of the completion of the Partial Review. The timing of this is not ideal and is beyond the Council's control. The Council intend to complete the Climate Emergency Partial Review of the Local Plan and adopt the revised Plan on receipt of the Inspectors Report. The Full Review will be run alongside this process.
- 3.10 The preparation of the full plan review comes at a challenging time, particularly with uncertainty over the implementation of proposed changes to national plan-making approaches. The Government consulted on reforms to the plan-making system in late 2022 and in 2023 and maintains that it intends to formalise these reforms with greatly revised plan preparation processes applicable from autumn 2024.
- 3.11 Should these reforms be formalised then there will be much time pressure on local planning authorities advancing a local plan under the existing plan-making system. The Government has proposed that local plans being prepared under the existing system must be submitted by 30 June 2025 and adopted by the local planning authority by 31 December 2026. If a local planning

authority does not submit a plan that it is currently preparing under the existing system by 30 June 2025, then it will have to formally recommence preparation in accordance with the new system.

- 3.12 The City Council intends to make rapid progress on the preparation of the Local Plan and will be looking to submit a full plan for examination by the June 2025 deadline, thus allowing it to be prepared and assessed under the existing system. A proposed timetable for this is shown below. Further details on this can be found in the published Local Development Scheme for the District.

Key Local Plan Stage	Anticipated Timetable
Scoping, Issues and Options	Spring 2024
Publication of Draft Local Plan (Regulation 18)	Autumn 2024
Publication of Finalised Local Plan (Regulation 19)	Spring 2025
Submission of Plan to Government	Prior to 30 June 2025
Public Examination	Autumn 2025
Adoption	Spring 2026

Table A: Anticipated Timetable for Local Plan Delivery 2024 – 2026

- 3.13 The Council is aware that this is a very ambitious timeframe for plan preparation. There are several challenges to meeting this timescale including uncertainty about the implementation of the new system, an ever-evolving national planning policy position, changing environmental regulation regimes, the prospect of challenge from the community and stakeholders, and the unavoidable challenge of compiling a robust, adequate and proportionate evidence base.
- 3.14 Notwithstanding this the Council is committed to the preparation of a new Local Plan and will be looking to prepare this under the existing Local Plan preparation system. Consultants are being commissioned on this basis with this brief prepared in this context. The Council must however be mindful of the potential that exists for this not to be achieved and as such must ensure that work undertaken is future proofed with a view to being transferrable to the new system of plan preparation should this become necessary. With this in mind the Council requests that tenders reflect this uncertainty and ensure that they are again future proofed with the potential for both a new environmental assessment regime and plan preparation process.
- 3.15 As identified above the City Council is seeking to produce a revised Local Plan for Lancaster District. To assist in this process the City Council is looking to procure external assistance to prepare the SA and HRA of the reviewed Local Plan. This may be expanded in the future to include additional DPDs and Supplementary Planning Documents (SPDs).
- 3.16 The output of both the SA and HRA will be placed in the public domain by the City Council and as such will be readily available to view on the Council's website. All outputs must therefore be presented in a form that permits on-line viewing. Further detailed briefing will be provided to the consultants appointed. The project will be undertaken in a series of stages which are summarised below.

3. THE PROJECT

Stage 1 – Scoping of the Local Plan

Sustainability Appraisal

- 4.1 The first stage involves a review and update of the Council's existing SA Scoping Report for the District. The SA Scoping Report for the adopted Local Plan was prepared in 2012. It was subsequently reviewed and updated as part of the Partial Review with a new Scoping Report published in 2020.
- 4.2 The Council will require the preparation of a new Scoping Report for the Full Review. This should build on and utilise the work undertaken to date and should be prepared in dialogue with the three SA bodies. It will require a full review of baseline information and relevant plans and strategies. Revisions will be required in light of any feedback from the three SA bodies.
- 4.3 The City Council will require the commissioned consultants to advise and provide an overview of the City Council's consultation and adoption processes to ensure legislative compliance for the adoption of the revised Scoping Report. As the Local Planning Authority, the City Council will be responsible for consultation on the scope of the SA. Responses received will then be provided to the commissioned consultants who will be required to consider the responses and make any necessary amendments to the Scoping Report ahead of the publication of the final document.
- 4.4 The potential to establish an SA Panel of key stakeholders should be explored and advised on as part of the brief.
- 4.5 Upon completion of Stage 1 the City Council will have an up-to-date Scoping Report that sets the overall approach to SA for the Local Plan review and establishes a SA Framework that sets:
 - Sustainability Objectives,
 - Identifies SA Issues, and,
 - A Sustainability Appraisal Methodology.

Output 1: The preparation of a new SA Scoping Report. The Scoping Report must meet the requirements of Stage A as set out in the Sustainability Appraisal and Strategic Environmental Assessment Guidance (2015).

Habitats Regulation Assessment

- 4.6 In preparation for the production of future DPD's the City Council requires the production of a briefing paper outlining the procedural requirements of the HRA and advising on the approach which the City Council will need to follow to ensure compliance with the Habitats Directive.
- 4.7 The briefing paper will also need to refer to cross-border issues associated with each of the four national site network sites. It is the Council's view that given the shared boundaries of several of its designations potential exists to develop a shared evidence base with neighbouring authorities and the County Council. The Briefing Paper should advise the City Council on opportunities for joint working having regard to cross border issues.
- 4.8 The paper should look to identify potential pathways and advise on the evidence base needs likely to be required through the HRA process. This should be circulated to Natural England for comment with this providing clear instruction for the HRA.

Output 2: Prepare a briefing paper advising on the HRA process and opportunities for joint working. This will be an internal document for the City Council.

Stage 2 – The Assessment

- 4.9 The City Council is seeking to retain the services of the selected consultants to undertake the SA and HRA as required during the preparation of the new Local Plan.

Issues and Options (Regulation 18)

- 4.10 The City Council intends to undertake early scoping work and issues and options (Regulation 18) on the Local Plan in spring 2024. The Council recognise that it is important to explore the scope and parameters of the Plan, identifying key issues and matters that will need to be explored. Engagement with key partners will be a key component of this stage as will the compilation and assessment of the Council's evidence base. The SA Scoping Report will be used to assist in the identification of key issues for the Plan.
- 4.11 Following this the City Council will look to publish a series of Issues and Options Topic Papers late Summer / early Autumn 2024. These will aim to set out key issues and potential options across a series of topics.

Sustainability Appraisal

- 4.12 The City Council will require a high-level SA assessment of this work presenting the SA's conclusions on the likely issues for the district and assessment of high-level option work relating both to allocations and potential detailed policies. The conclusions of this work will be incorporated into the Topic Papers and will help explain the evolution of policy options.

Output 3: High level assessment of the Council's issues and options assessment. This should be presented in a way that is appropriate for wider consultation with the document to be made available as part of the Council's consultation.

As the exact number of Topic Papers to be prepared is unknown tenders should reflect the costs of assessing individual options and advise on how this work will be undertaken.

Habitats Regulation Assessment

- 4.13 The HRA implications emerging from the Council's issues and options work should be assessed and a short briefing note prepared. This will be consulted on as part of the Issues and Options analysis and should form the basis for discussions with Natural England, having regard to their known concerns for growth within the District.

Output 4: HRA briefing note to accompany Topic Papers.

Publication of a Draft Local Plan (Regulation 18)

- 4.14 Following this work the City Council will, using feedback from the scoping consultation together with its wider evidence base prepare a draft Local Plan. The Draft Plan will be prepared in dialogue with the commissioned consultants with potential options explored throughout the draft document's development and via the Topic Paper preparation.
- 4.15 It is envisaged that this work will take place over the summer of 2024 with a draft document prepared for consultation late 2024.

Sustainability Appraisal

- 4.16 This stage of the commission relates to Stage B of the Sustainability Appraisal and Strategic Environmental Assessment Guidance (2015). The work should build on the earlier issues and options work and should be reported via an Interim Sustainability Appraisal Report which will be made available for consultation as part of the Council's Regulation 18 work. The Council also intend to publish the Topic Papers as part of this consultation setting out more detailed information on the evolution of the policies and allocations.
- 4.17 The City Council will expect the commissioned consultants to assist in this stage of the project via regular project meetings assisting and advising on the assessment of options as they emerge and advising on the plan's development. This will be an iterative stage with the conclusions of this work reported via an interim SA Report prepared to accompany the draft Local Plan for wider consultation. Opportunity to utilise an SA Panel should be explored as part of this stage.

Output 5: Interim SA Report which documents the SA the Local Plan. This will document the SA work undertaken to date advising on the assessment of the draft Local Plan including option analysis.

Habitats Regulation Assessment

- 4.18 In line with the Habitats Regulations the Council will require a HRA screening report for the Draft Local Plan. The screening report will need to determine whether the draft Plan will, in combination with other plans and programs, give rise to any significant adverse effects on protected sites previously identified as part of the EU's Natura 2000 ecological network. The national site network includes Special Areas of Conservation (SACs), and Special Protection Areas (SPAs). Ramsar sites whilst not included as part of the national site network remain protected in the same way as SACs and SPAs. Government policy statements have been issued making clear that they should be afforded the same level of protection afforded to SPAs and SACs.
- 4.19 This work should be undertaken in dialogue with Natural England and should document the screening process and evolution of options.
- 4.20 At this stage the project relates only to the initial screening exercise. Should it be determined that a full Appropriate Assessment (AA) is required, this will be subject to a separate commission outside of the scope of this project. The ability to undertake this work, should it be required, be considered as part of this proposal.

Output 6: Prepare and publish interim HRA screening report for the draft Local Plan. Submitted tenders should also provide an initial assessment of availability to undertake a full AA for the Local Plan should a need be identified. The requirement for a full AA of the Local Plan DPD does not form part of this commissioned project.

Publication of Finalised Local Plan (Regulation 19)

- 4.21 Following consultation on the draft Local Plan the Council will look to finalise the Local Plan ready for publication. The Council will need to refine the document to take account of any further evidence, consultation comments received and any changes in national policy. Amendments may also be required in light of comments made in the SA and HRA.

- 4.22 Once finalised the Local Plan will be published for a minimum 6-week period for formal representations. This is currently scheduled to take place in the Spring of 2025.
- 4.23 Following the close of the publication period the Local Plan, including all supporting documentation and representations, will be submitted to the Government for examination.

Sustainability Assessment

- 4.24 A final SA Report should be prepared to support the publication document. This stage of the project relates to stages C and D of the Sustainability Appraisal and Strategic Environmental Assessment Guidance (2015). This work will need to take account of any changes made to the document following the draft consultation.
- 4.25 At this stage it is not envisaged that further amendments to the SA report will be required. However, tenders should reflect the potential for additional amendment work to be undertaken in light of any proposed modifications that emerge through the examination process. The contractual arrangements required to undertake this work should be highlighted in the submitted tenders.

Output 7: Preparation and publication of final SA Report.

Habitat Regulation Assessment

- 4.26 A final HRA Screening report should be prepared to accompany the publication document. This work will need to take account of any changes made to the document following the draft consultation.
- 4.27 At this stage it is not envisaged that further amendments to the HRA report will be required. However, tenders should reflect the potential for additional amendment work to be undertaken in light of any proposed modifications that emerge through the examination process. The contractual arrangements required to undertake this work should be highlighted in the submitted tenders.
- 4.28 As identified above at this stage the project relates only to the initial screening exercise. Should it be determined that a full AA is required, this will be subject to a separate commission outside of the scope of this project. The ability to undertake this work, should it be required, should still be considered as part of this proposal with potential costings and contractual arrangements highlighted.

Output 8: Preparation and publication of final HRA Screening Report

Post adoption

Sustainability Appraisal

- 4.29 The Council will require the commissioned consultants to undertake stage E of the Sustainability Appraisal and Strategic Environmental Assessment Guidance (2015). This relates to the preparation and adoption of the post-adoption statement including the detailing of monitoring arrangements.

Output 9: Preparation and publication of the post-adoption SA Statement.

5. COSTS

- 5.1 Submitted proposals should provide a quotation for the preparation of the Open Space Study, including any additional costs in its preparation, for example the securing of relevant data, the carrying out of site survey work, and meetings with Council Officers. It would also be beneficial if each of the costs could be itemised as much as possible in relation to each of the tasks involved (i.e. provide an indication as to the cost for X site visits). Following the COVID Pandemic and shifts in working practices, it is acknowledged that most meetings can be now held virtually, particularly in the case of project update meetings which should be included within the proposal.
- 5.2 Payments should be made at specific trigger points through the course of the project and following the receipt of an invoice with a purchase order provided by the Council. These trigger points can be finalised and agreed prior to appointment of the chosen consultant but will need to follow on from the receipt of work (for instance a draft report). In the context of this commission the City Council would suggest the following triggers:
- 20% upon receipt of Outputs 1 and 2.
 - 25% upon receipt of Outputs 3 and 4.
 - 25% upon receipt of Outputs 5 and 6
 - 20% upon receipt of Outputs 7 and 8.
 - 10% upon receipt of Output 9.
- 5.3 Please note that whilst looking to obtain the best value for the Council, the Council is not bound to accept the lowest cost with quality and output of the work being important considerations. Details of the selection and assessment process are set out in Section 6 and Appendix 1 of this brief.

6. SELECTION PROCESS

- 6.1 Tenderers must first submit a written proposal in the form set out below. Up to three best scoring tenderers may then be invited forward for an interview at the Council's discretion. Written proposals will be scored upon the full criteria set out below, with performance at interview further scored against the criteria below.

Submission Requirements

- 6.2 Submitted proposals should provide a quotation for the preparation of each part of the project including any additional costs, for example Inception Meeting and any additional meeting requirements. Where desirable, the Council would expect meetings to be virtual although some face-to-face meetings can be included where it is felt necessary for the project. Regular progress update meetings should also be included within the proposal, again these update meetings can be held on a virtual basis.
- 6.3 Submitted proposals should contain the following information:
- A descriptive account of appropriate relevant and recent experience. Contact details should be provided for authorities previously worked with.
 - The proposed methodology for undertaking the project.
 - The submitted proposals should identify why you see yourselves as the most appropriate contractor for the project.

- Proposed staff with CV's appended. It is important that details of the actual project team are provided. If progressed to stage 2 of the selection process the City Council would expect to meet this project team at interview.
- Fee costing for each stage and output, including daily rates of project team.
- Indicative timetable for undertaking the project. Timeframes for completion of each stage should be included.
- Provide details of the registered company number and registered office address.
- Signed and dated returnable forms.

6.4 Whilst not forming part of this commission submitted proposals should highlight relevant experience in giving evidence and attending Examination in Public Hearing sessions.

6.5 Payments should be made at specific trigger points within the project and following the receipt of an invoice with a purchase order provided by the Council. These trigger points can be finalised and agreed prior to appointment but must relate to tangible outputs (i.e. the production of a report or the undertaking of workshops etc).

7. ASSESSMENT CRITERIA

7.1 Consultants will be selected for informal interview based on the following factors (the proportion of the assessment score is also identified):

Quality Criteria:

- 1. Capability (20%):** The submission should clearly demonstrate the skills and experience of the staff and project team, including relevant specialised technical knowledge.
- 2. Experience and Track Record (20%):** The submission should include past experience and case studies which should clearly demonstrate that the consultant has the ability to provide the outputs required within the brief.
- 3. Capacity to Undertake the Work (15%):** The submission should clearly demonstrate how the project will be managed to ensure that the outputs identified are delivered to a measurable and appropriate timeframe. The availability of staff from within the project team should be clearly identified within the submission.
- 4. Methodology (20%):** The submission should clearly demonstrate a robust, clear and logical method for undertaking the project and achieving the outputs identified. This should take account of the consultant's own views on why they are the most appropriate contractor for the project.

Cost Criteria:

7.2 Please note that whilst looking to obtain the best value for the Council, the Council is not bound to accept the lowest cost with the quality and output of the work being an important consideration. In terms of assessment, pricing will be scored at 25%.

- 7.3 For example, the lowest price (LP) is awarded the maximum weighted score, each subsequent submission will be scored by taking the additional cost over and above the LP as a percentage of the LP, then deducted from the score of 100, then nominalised to the weighting score (WS).
- 7.4 Further detail on the scoring criteria and breakdown of scoring criteria are contained in Appendix 1 of this Brief.
- 7.5 Please note the Council reserves the right to reject any incomplete tender response, but may at its discretion seek clarification where there is a clear and manifest error in the response.

8. OUTLINE TIMETABLE

- 8.1 The deadline for submitting tenders is noon on Monday 19th February 2024.
- 8.2 Consultants proposing to submit proposals are advised to ensure that they are fully familiar with the procedures, requirements and obligations of Lancaster City Council’s contractual processes for the appointment of external consultants. **It should be noted that the terms and conditions which accompany this tender are not negotiable.**
- 8.3 As outlined above, based on the information returned the City Council may seek to interview consultants to clarify specific aspects of the submitted tender. If required, interviews are currently scheduled to take place on the week commencing the week of the 26th February 2024.

Target Date	Activity
Monday 29 th January 2024	Issue Invitation of Tender Documents
Monday 19 th February 2024 @ noon	Return of Tender Documents
W/c 26 th February 2024	Interview Date (via Microsoft Teams)
W/c 26 th February 2024	Notification of Intention to Award Contract
W/c 4 th March 2024	Inception Meeting and Project Commencement
May 2024	Scoping Report Completion
Summer / Autumn	Testing of Options for SA / HRA
Winter 2024	SA / HRA of Draft Local Plan
Spring 2025 Onwards	Refinement of SA / HRA and Post Adoption Statement

- 8.4 The table above provides an anticipated timeframe which the Council considers to be reasonable and appropriate for the work required. However, if you feel that the timeframe is not appropriate please state within your submission why this is the case, supported by an alternative timeframe.

9. CONTACT DETAILS

- 9.1 **Please note that the responses to any questions posed by interested parties will be posted on the Council’s CHEST system.**

Appendix 1: Evaluation Criteria

Quality will account for 75% of the Overall Score. The following scoring methodology will apply:

5 – Excellent Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

%

4 – Good Satisfies the requirement with minor additional benefits. Above average demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response.

3 – Acceptable Satisfies the requirement. Demonstration by the Supplier of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services.

2 - Minor Reservations Satisfies the requirement with minor reservations. Some minor reservations of the Supplier’s understanding and proposed methodology, with limited evidence to support the response.

1 - Serious Reservations/Non-compliant Satisfies the requirement with major reservations. Major reservations of the Supplier’s understanding and proposed methodology, with little or no evidence to support the response.

0 - Unacceptable/Non-compliant Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Supplier has the understanding or suitable methodology, with little or no evidence to support the response.

Number	Criteria	Demonstrated by	Scoring
1	<p>Capability The submission should clearly demonstrate the skills and experience of the staff and project team, including relevant specialised technical knowledge.</p>	<ul style="list-style-type: none"> • Where relevant identification of areas of innovation you will deliver. • Identification of key members of the project team. • The provision of CVs for key members of the project team 	20%
2	<p>Experience and Track Record The submission should include past experience and case studies which should clearly demonstrate that the consultant has the ability to provide the outputs required within the brief.</p>	<ul style="list-style-type: none"> • Examples of previous work and track record to demonstrate experience in undertaking the brief. • Examples should be clearly linked to the project team undertaking the work. • References should be provided to endorse previous work when identified in the brief. 	20%
3	<p>Capacity The submission should clearly demonstrate how the project will be managed to ensure that the outputs identified are delivered to a measurable and appropriate timeframe. The availability of staff from within the project team should be clearly identified within the submission.</p>	<ul style="list-style-type: none"> • Identification of a project team which has a clear structure. • How much time will be devoted to undertaking the project. • Clarity and realism of resources provided and ability to complete the task. • Where there the proposal involves subcontracting, a clear outline of how this will be achieved and who will be involved. 	15%
4	<p>Methodology The submission should clearly demonstrate a robust, clear and logical method for undertaking the project and achieving the outputs identified. This should take account of the consultant's own views on why they are the most appropriate contractor for the project.</p>	<ul style="list-style-type: none"> • The proposal should include a clear statement outlining the method and approach to be achieved to secure the outputs. • Comprehensiveness and logic of the proposal. • Explanation of services to be delivered and evidenced justification this can achieve the required outcomes. 	20%

5	<p>Best Value In the context of the submission, the tender should seek to demonstrate value for money or, alternatively clearly demonstrate where added value is being achieved through their proposal.</p>	<ul style="list-style-type: none"> • The proposal should include a clear project cost and, where possible this should be itemised against the outputs identified. • Where added value is being proposed, this should be clearly identified with costs against any additional outputs. • Daily rates of the project team should be clearly identified. 	25%
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