***Terms of Reference for the Appointment of a Consultancy to provide a Social Value Evaluation of the Liverpool City Region Spatial Development Strategy to help shape Policy Development.***

***Background***

*The Liverpool City Region Combined Authority (“LCRCA”) Devolution Deal requires the LCRCA to produce a City Region Spatial Development Strategy (“SDS”). As one element of the development of the SDS the LCRCA is proposing to use social value to inform and influence its planning policy direction. The Metro Mayor considers the social value of the Strategy to be central to its production. The LCRCA therefore wants to appoint a consultancy, which specialises in social value evaluation of planning policy, development and land use, to undertake a social value evaluation of the LCR’s SDS as it is developed and for its final version. The use of social value evaluation to guide the policy direction of a spatial planning strategy is considered as an innovative development in the field of spatial planning.*

***The Requirement***

*The objective of the tender is to secure an ongoing social value evaluation of the LCR SDS as it progresses to an initial non-statutory consultation, on to policy development through to the final version. The different stages of evaluation will be:-*

1. *To provide input into the social value potential of the Shaping / Scoping / Visioning Consultation version of the SDS - likely to be going to consultation in the summer / autumn 2019.*
2. *To provide input into the social value potential of policies as they are developed, anticipated to be between 30 and 40 policies. This will be ongoing over a likely period between autumn 2019 – summer 2020.*
3. *To provide a costed and justified social value evaluation of the statutory ‘Public Participation’ (akin to ‘Submission’) version of the SDS - likely to be completed in the summer / autumn 2020.*
4. *To provide, where necessary, input prior to and during the examination of the SDS to justify the social value of the policies and any necessary modifications to them.*

***The Deliverables***

*Each of the 4 stages the LCRCA will require meetings to discuss the SDS development. Written reports setting out the recommendations will be required at stages 1,3, and 4:-*

*For Stage (1) there will be a number of meetings/ conference calls with the SDS Team to discuss the content of the Shaping / Scoping / Visioning Consultation version and a report will be required setting out recommendations. As part of your submission please provide suggested numbers and frequency of the meetings / conference calls.*

*For Stage (2) there will be a number of meetings / conference calls with the SDS Team to discuss policy development requiring input and feedback on policy options from a social value perspective. As part of your submission please provide suggested numbers and frequency of the meetings / conference calls.*

*For Stage (3) there will be a number of meetings / conference calls with the SDS Team to discuss the content of the ‘Public Participation’ (equivalent to ‘Submission’) version of the SDS and a report will be required setting out recommendations which will be available for public consultation / engagement. As part of your submission please provide suggested numbers and frequency of the meetings / conference calls.*

*For Stage (4) there will be a number of meetings dependent on the level of scrutiny to which the social evaluation of the policies is given prior to and during the examination. Further written reports / addendums may be required depending on the extent to which policies are modified.*

*Once the SDS has been formally Published by the Metro Mayor / CA (equivalent to ‘Adopted’) a finalised version of the report will be required setting out the social value of the SDS.,*

*It is anticipated that meetings will be held at the LCRCA Offices or by way of teleconference where appropriate.*

*In addition to the production of the final report 3 x 1 hour training / CPD presentation shall be provided for the LCRCA Officers and invited Officers from the 6 constituent Local Authorities on the findings of the study.*

***Format***

*The Reports should be provided in a Microsoft Word format. This should be provided in electronic version (1 pdf version and 1 Microsoft Word version) and 3 hard copies of each Report.*

***Timescale***

*The Deliverables are for production at different timescales (indicative timescales are listed below):- .*

1. *Potentially from Spring to Summer 2019 for the Shaping / Scoping / Visioning Consultation version of the SDS (which is likely to be going to consultation in the summer / autumn 2019.)*
2. *Potentially from Autumn 2019 to Summer 2020 for the policy development*
3. *Potentially up to Summer 2020 for the statutory ‘Public Participation’ (akin to ‘Submission’) version of the SDS.*

*These timescales will be agreed during the contract timescale discussions as stage timescales may vary. The CA will request to meet the consultant selected at an inception meeting and then various meetings as set out above, within the timeframe of the study. A draft report will be required for (1), (3) and (4) in The Requirements Section in order that it can be reviewed and agreed prior to the production of the reports.*