

**Lancaster City Council Invitation to tender for the
Procurement of Lancaster South Area Action Plan DPD**

South Lancaster Economic Growth & Employment Strategy

15 October 2021

RETURN DATE FOR SUBMISSION

Noon on Friday 5 November 2021

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1. Introduction

- 1.1 Lancaster City Council formally adopted its new Local Plan in July 2020 which included a Strategic Policies & Land Allocations Development Plan Document (DPD) and a reviewed Development Management DPD. Policy SG1 of the Strategic Policies & Land Allocations DPD, entitled 'Lancaster South Broad Location for Growth (including Bailrigg Garden Village)', sets out a commitment for the Council to prepare an Area Action Plan DPD to set a more detail planning framework for growth in this area. The Area Action Plan DPD (AAP DPD) will guide and manage future growth, including the evolution of Bailrigg Garden Village providing detail on delivery and the creation of new cohesive communities in the South Lancaster area.
- 1.2 The ability to deliver cohesive communities is reliant on considering not only the delivery of new homes but also the economic growth and demand which will be associated with it. It is critical that economic opportunities are maximised and the local economy boosted through new job creation and investment. The Council seek to take advantage of these opportunities in challenging times, with the impacts of both the COVID-19 Pandemic and Brexit still to be understood.
- 1.3 In order to understand these opportunities and challenges better in the context of South Lancaster and the preparation of the Lancaster South AAP DPD the City Council is seeking to commission suitability qualified economic / planning consultants to assist in the preparation of the economic evidence base required to support the AAP DPD.
- 1.4 Work on the AAP DPD is being informed by the preparation of a detailed Masterplan and Design Code for the South Lancaster area. The Council have appointed external consultants JTP to lead on the preparation of both these elements which will set general development parameters and design principles for the area, this will likely include illustrative areas for employment and economic opportunity. The Masterplan and Design Code, once completed, will form core elements of the AAP DPD which will then establish the regulatory framework necessary to plan and make decisions on future proposals in this area and delivery high quality, sustainable growth.
- 1.5 The key elements of this commission relate to the following elements of work:
 - a. In a wider context, to explore the impacts of COVID on the local economy and the implications on creating new employment opportunities in South Lancaster. This should consider the evolution of working practices include the growth of home-working and future opportunities for live-work units.
 - b. Seek to explore the employment opportunities presented from the JTP masterplanning process and reach conclusions on the soundness, realism and feasibility of their ambitions.
 - c. Look at how growth in South Lancaster can promote localised job opportunities and minimise economic leakage to other areas. To assist in setting out a framework for how job creation will be achieved within the Garden Village and its relationship with wider economic uses in the district.
 - d. Come forward with recommendations on the quantum and scale of employment / economic opportunities which could be realised across the South Lancaster area. This should address the level of land required to meet demand in relation to the overall level of job creation which could be achieved. This should use relevant forecasting model(s) to accurately support this.
 - e. The strategy should look at how economic growth in South Lancaster can link to existing drivers within both the district, including Heysham Gateway, Lancaster University, Lancaster Health

Innovation Campus and the proposed Agri-Business Centre in Galgate. The Strategy should also consider any economic opportunities which may arise outside of the plan-making process and through consented applications.

- f. The Strategy should consider how it can support and realise key ambitions of the Council. This should include how growth in South Lancaster can stimulate jobs in key green sectors of the economy, how growth in South Lancaster can try a green economic recovery from the COVID pandemic and how economic growth can support the Council's actions around their declared Climate Emergency.

1.6 These elements are described in more detail in Section 4 of this brief.

2. The Client

2.1 The City Council is looking to procure work under its role as Local Planning Authority for the District.

2.2 The project is being commissioned by:

Planning and Place Service
Planning & Housing Strategy
Lancaster City Council
PO Box 4
Lancaster Town Hall
Dalton Square
Lancaster
LA1 1QR

3. Background

3.1 On the 29th July 2020, the City Council formally adopted the Strategic Policies & Land Allocations DPD and reviewed Development Management DPD (the new Local Plan for Lancaster District). The Local Plan establishes the planning policy framework for the district, setting out the spatial vision for the area and the policies and land allocation that will be used to determine future planning applications.

3.2 In addition to allocating land it also identifies a Broad Location for Growth to the South of Lancaster. The Council's expectations for development, the Key Growth Principles, are established in Policy SG1 of the Strategic Policies & Land Allocations DPD. Importantly, the Local Plan does not allocate land in this area, rather it simply establishes a broad designation and the intention that development is needed in South Lancaster to meet the needs of the district over the plan period. Policy SG1 also commits the Council to prepare an Area Action Plan DPD (AAP DPD) which will provide the detailed planning policies and allocations for this area. The context of Policy SG1 is set out in Figure 3.1.

3.3 Policy SG1 includes the expectation that growth in South Lancaster will include (and be focused on) the creation of a new Garden Community (Bailrigg Garden Village). This follows the successful identification of this area by the Government in 2017, one of only 34 Garden Villages identified across the country, as part of its Garden Villages and Towns Programme. The Government is clear that these areas should be vibrant, mixed use, communities where people can live, work and play for generations to come, each with holistically planned, self-sustaining and characterful.

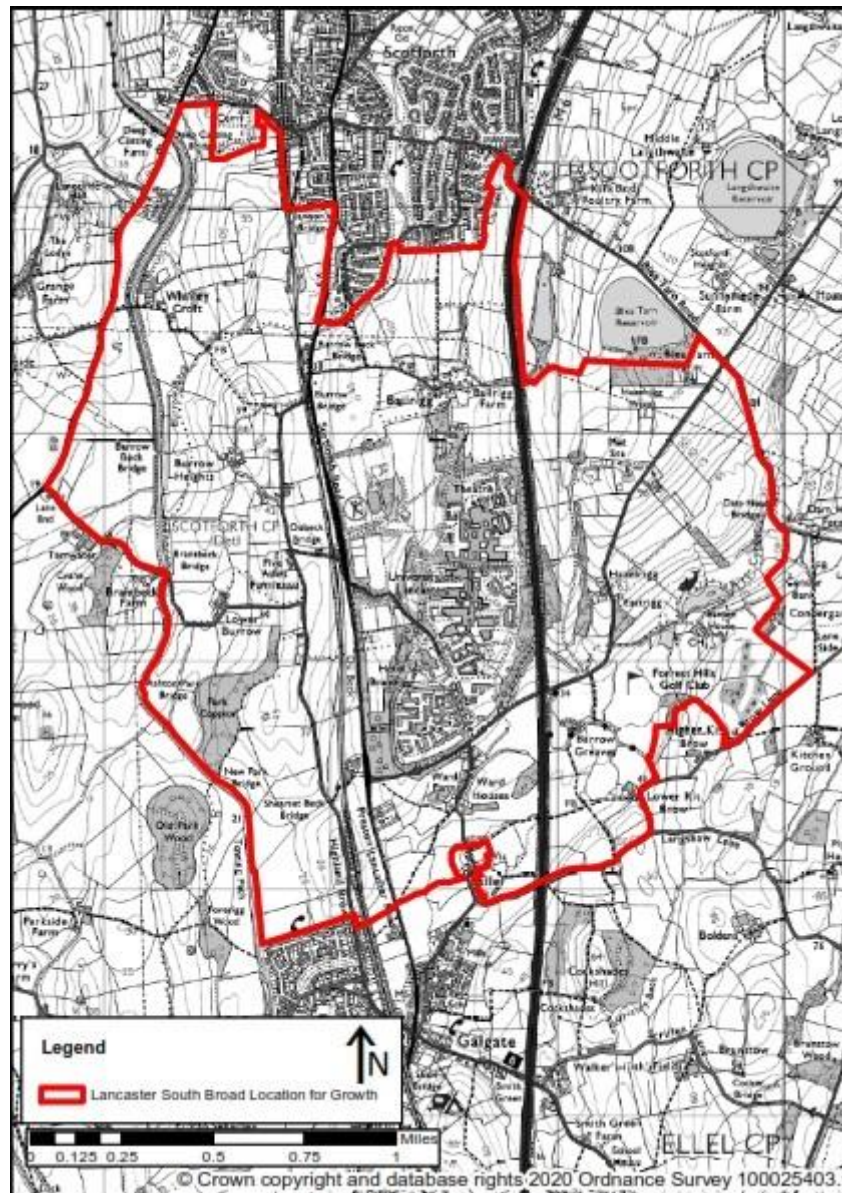


Figure 3.1: Map to show the extent of the 'Lancaster South Broad Location for Growth' as defined via Policy SG1 of the Strategic Policies & Land Allocations DPD.

- 3.4 Initial work on the AAP DPD began in 2017 with the Council exploring a series of options for potential development and growth in the South Lancaster area. Through engagement sessions in late 2017 and early 2018 the Council explored the relative merits and disadvantages of each option. Whilst there has been a significant hiatus in work until the commission of JTP and the adoption of the Local Plan, this work will still be used to inform the preparation of the AAP DPD.
- 3.5 A key informant of the AAP process will be the currently ongoing masterplan work. The City Council, through its Property, Investment and Regeneration Team, have commissioned external consultants JTP to assist in the preparation of a Masterplan and Design Code for the South Lancaster area. Whilst this will be used to establish the general location, shape and layout of development, it will be for the AAP DPD process to provide formal allocations of land and take this forward the ambitions of the masterplan / design code process into planning policy. It is recognised that both documents must

work together to ensure a positive and robust framework for growth in the South Lancaster area, complementing each other and ensuring that the regulatory requirements are met.

- 3.6 The Council is committed to the plan-led development of this area and following early engagement work, and the recent adoption of the Local Plan, is now looking to progress with the preparation of the AAP DPD. The Council wish to make rapid progress in preparing the DPD, the timetable is set out in the July 2020 Local Development Scheme (LDS). This anticipates that much of the work needed to support the AAP DPD, including the completion of the Masterplan and Design Code will progress through the course of 2021 and 2022.
- 3.7 On this basis the Council would anticipate that a draft AAP DPD would be available for informal consultation (under Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012) by early 2022.
- 3.8 The Council anticipate the supporting evidence which will be used to underpin the allocations and policy direction of the AAP DPD to be completed and available in time for the informal Regulation 18 consultation.

Employment and Economic Evidence

- 3.9 To ensure soundness and robust decision making, the Local Plan was supported by a proportionate evidence base which was used to inform the content and direction of the DPD, from the allocations made, to the policy decisions taken. This included the preparation of a series of economic reports including an Employment Land Review (2015), Economic Prospects Report (2015 & 2017) and Inclusive Growth Strategy (2018).
- 3.10 The Employment Land Review was undertaken by Turley Economics in 2014 / 2015 to provide the Council with a firm understanding over opportunities for job creation through the plan period, the quantum of future employment land required to realise these opportunities and a review of the established employment allocations to assess their ongoing economic value.
- 3.11 The Economic Prospects Report, initially prepared by Turley Economics in 2015 and subsequently updated in 2017 set out the economic opportunities in the district and the potential key growth areas which the Council could seek to prioritise both through the Local Plan but also in any future Economic Growth Strategy.
- 3.12 The Inclusive Growth Strategy was undertaken by consultants Hall Aitken in 2018 to identify opportunities to ensure that economic growth was inclusive to all sections of the district's community.
- 3.13 This economic evidence can be found and reviewed in more detail in the City Council's website at [Evidence, monitoring and information - Lancaster City Council](#)

4. The Project

- 4.1 In order to support and inform the preparation of the Lancaster South Area Action Plan DPD the Council recognise that it must have a greater understanding of the economic opportunities and challenges to delivering growth in this area and creation of a new garden village. The proposal will

use wider contextual evidence provided via the Local Plan process and seek to provide an area specific steer towards South Lancaster.

4.2 The Strategy should address the following aspects:

Consideration of Macro-Economic Indicators

- 4.3 Start with consideration of the current macro-economic climate in the context the challenges and opportunities that has for Lancaster District, this includes the anticipated short / medium / long term impacts arising from the COVID Pandemic and the implications of the United Kingdom leaving the European Union. In considering the macro-economics, these should be considered in the context of delivering economic growth and jobs to South Lancaster. This should consider matters such as the potential growth in home working, potential shifts in retailing patterns (i.e. growth in home deliveries) and the opportunities for live / work units and the future of office-based employment.

Appraisal of the emerging Bailrigg Garden Village Masterplan

- 4.4 The appointed consultants should seek to appraise the masterplan for Bailrigg Garden Village which has been prepared by Council-appointed JTP consultants in regard of the employment opportunities which have been proposed. Conclusions should be drawn within the Strategy over the feasibility and realism of the economic proposals which have been put forward by JTP and whether these would represent a sound approach to take with the forthcoming Area Action Plan DPD.

Recommendations over the Quantum of Jobs / Employment Space to be delivered

- 4.5 The Strategy should come forward with recommendations over the quantum and scale of employment opportunities which could be realised through the creation of Bailrigg Garden Village and wider growth in South Lancaster. This should address the level of land which will be necessary to meet opportunities and ambitions for economic growth arising from this Strategy. The Strategy should use relevant forecasting model(s) to ensure the recommendations made are robust and sound.

Building on Existing Economic Drivers

- 4.6 The Strategy should look at how future economic growth in South Lancaster can link with existing economic drivers within the district, this should include potential links with both Lancaster University Campus and the Health Innovation Campus which sit within the Broad Location for Growth. Consideration should also be given to wider links in the district, such as the planned regeneration of Heysham Gateway, the Port of Heysham and Heysham Nuclear Power Station. Beyond planned growth the strategy should take account of other drivers which have come forward outside of the plan-making process.

Minimising Economic Leakage

- 4.7 In coming forward with recommendations for over economic growth and job creation, the appointed consultants should set out approaches to how these benefits can be harnessed locally (i.e. maximising the opportunity for local job creation). The Council wishes to ensure that the Garden Village and surrounding development becomes a genuinely cohesive settlement where people and both live and work. In order to achieve this it will be important that the Strategy considers how leakage can be minimised and the need to commute in and out of the district is reduced.

Supporting the Ambitions of the Council

4.8 The Strategy needs to look at how economic growth in Bailrigg Garden Village and wider South Lancaster can plug into the key ambitions of the Council. This should include:

- How economic growth in Bailrigg Garden Village and South Lancaster can stimulate jobs and employment in key green and knowledge-based sectors of the economy;
- Investigate opportunities for the role / application of community or publicly owned broadband infrastructure to ensure the demands of connectivity for new ways of working are
- How economic growth in Bailrigg Garden Village and South Lancaster and help drive a green economic recovery from the COVID Pandemic and how economic growth can support the Council's actions around Climate Change and the declared Climate Emergency; and
- How economic growth in Bailrigg Garden Village and South Lancaster and help deliver inclusive economic growth which benefits a full cross-section of the district's communities.

I would include for the role / application of community / publicly owned broadband infrastructure to ensure the demands of connectivity for new ways of working are sufficient to meet demands.

5. Costs

5.1 Submitted proposals should provide a quotation for the preparation of the strategy and including any additional costs in its preparation, for example the securing relevant modelling data and an Inception Meeting. Under the current circumstances it is acknowledged that meetings will likely be held virtually through the project period. Regular progress update meetings should also be included within the proposal.

5.2 Payments should be made at specific trigger points through the Council 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, however the Council would suggest the following triggers:

- 70% upon receipt of a first full draft of the Strategy Document.
- 30% upon completion of the finalised Strategy Document.

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 the quality and output of the work being an important consideration.

6. Selection Process

6.1 The selection process for this project is composed of two components. The first component requires the submission of costed proposals which must identify costs for each stage of the commission and details of the key individuals which will be working on the project.

6.2 The assessment criteria which the City Council will follow in assessing costed proposals is outlined below. At this stage, the assessment will take the form of a subjective desk top review of the submitted proposals focused on capacity to undertake the project, previous experience and understanding of the project requirements.

- 6.3 Following this the City Council will select a maximum of three consultants to take forward to stage 2 of the selection process. It is important to highlight that the City Council is looking to establish an on-going working relationship with the selected consultants with services retained for several months. Stage 2 of the selection process is therefore designed to assess potential for this relationship and as such will be focused on determining the capacity for establishing a positive and responsive relationship between the plan making and landscape team. Assessment at this stage will therefore take the form of a short informal interview with the selected consultants. This may be held virtually rather than in person.

Submissions Requirements

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

7. Assessment Criteria

- 7.1 Consultants will be selected for informal interview based on the following factors:

1. Capability: Submissions will be assessed based on the skills and experience of staff, including specialised technical knowledge.

2. Experience and track record: Past experience will be examined in detail to ensure that the commissioned consultant has the ability to provide the required outputs.

3. Capacity: Submissions should identify how the project will be managed to ensure outputs are delivered. The availability of staff within the organisation to undertake this work will be assessed.

4. Methodology: Submissions will be assessed based on the proposed method for undertaking the project. This will take account of the consultant's own views on why they are the most appropriate contractor for the project.

8. Outline Timetable

- 8.1 The deadline for submitting tenders is noon on Friday 5th November 2021.
- 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.
- 8.3 As outlined above, based on the information returned the City Council will seek to interview a maximum of three consultancies. Interviews are currently scheduled to take place on the week commencing week commencing 8th November 2021.
- 8.4 The dates given below for undertaking the project are indicative and may be subject to change.

Target Date	Activity
15 th October 2021	Issue Invitation to Tender Documents
5 th November 2021	Return of Tender Documents
W/c 8 th November 2021	Interview Date (via Microsoft Teams)
W/c 8 th November 2021	Notification of Intention to Award Contract
W/c 15 th November 2021	Inception Meeting
End of January 2022	Completion of Draft Strategy
End of February 2022	Completion of Finalised Strategy

9. Contact Details

- 9.1 To discuss the brief and aid the submission of tenders please contact:

Planning and Place Service
Planning & Housing Strategy
Lancaster City Council
PO Box 4
Lancaster Town Hall
Dalton Square
Lancaster
LA1 1QR

- 9.2 Please note: all questions raised and responses to any questions posed by interested parties will be posted on the Council's CHEST system.