

**Invitation to Tender for Research and Consultancy Services**

**R1018b: London Plan Examination in Public – policy and evidential support**

London Councils represents London’s 32 boroughs and the City of London. We are a cross-party organisation that works on behalf of all of our member authorities regardless of political persuasion.

* London Councils makes the case to government, the Mayor and others to get the best deal for Londoners and to ensure that our member authorities have the resources, freedoms and powers to do the best possible job for their residents and local businesses.
* London Councils runs a number of direct services for member authorities including the Freedom Pass, Taxicard and Health Emergency Badge. It also runs an independent parking appeals service and a pan-London grants programme for voluntary organisations.
* London Councils acts as a catalyst for effective sharing among boroughs – be that ideas, good practice, people, resources, or policies and new approaches.

The Housing and Planning Team within the Policy and Public Affairs Directorate at London Councils works on pan-London housing and planning issues, in particular advocacy and joint working.

**Summary**The aim of this project is to enable London Councils to make a robust and influential contribution to the Examination in Public (EiP) process for the London Plan (LP), due to take place from 14 January 2019 to May 2019. The key task will be to support London Councils in building on its consultation response, presenting specific proposals for amendments to policies and providing responses to the Planning Inspector’s Examination Matters, supported by relevant policy and evidence as appropriate.

This brief sets out the context and requirements for the work for potential bidders. Details of how to submit a tender are provided at ‘Details of how to apply’ below.

**Context**

The Mayor is required to produce and update a London Plan, setting out the strategic planning framework for new development across the capital. Borough local plans, which set out the framework for local development, are required to be compliant with the London Plan and so the document is key for boroughs when determining the criteria by which both development plans and development applications should be considered.

A full review of the Plan was initiated by the previous Mayor Boris Johnson following his election in 2008, and completed in 2011. Following the publication of 2011 census data, it was agreed that the Plan would require alterations to reflect that population projections in the 2011 Plan were unrealistically low. These were published in early 2014 under the title Further Alterations to the London Plan (FALP) and a period of public consultation was undertaken, to which London Councils responded, with an Examination in Public (EiP) at which London Councils also made representations.

A revised London Plan, promoted by the new Mayor Sadiq Khan, was published in December 2017, to which London Councils submitted a 42 page consultation response in March 2018, the full document can be read here: <https://www.londoncouncils.gov.uk/our-key-themes/housing-and-planning/land-and-planning/gla-and-london-plan/draft-london-plan-2017>

The next stage of the process is a further Examination in Public (EiP), at which a Planning Inspector will take evidence and consider whether proposed amendments are compliant with national planning policy. The Inspector will then issue a report setting out his/her perspective on the LP and recommending any changes.

The EiP process provides an opportunity for London Councils both to promote its policy asks within the Greater London planning framework and to support the interests of boroughs.

**Purpose**

This invitation to tender seeks to procure consultancy support to meet the following objective:

* Help persuade the Planning Inspector of the need for relevant amendments to the LP, reflecting London Councils’ wider policy objectives and promoting the interests of boroughs in London-wide planning policy

The consultancy support is likely to involve the following stages of work:

* Analysis of LP to identify specific proposals for policy amendments, building on London Councils’ consultation submission and supported by relevant policy and evidence
* Drafting of briefing notes on Planning Inspector’s ‘Examination Matters’, supporting London Councils’ proposed policy amendments to the London Plan
* Advice and support on London Councils’ participation in Examination hearings, including the verbal presentation of evidence to the Inspector.

We require the following outputs from the project:

* an inception meeting to agree final plans
* progress meetings (in person or by phone) – weekly or otherwise
* proposals document for briefings and policy amendments
* drafts of written statements and briefing materials for examination hearings
* presentation of evidence at hearings

**Background**

London Councils is contributing to the Examination in Public (EiP) hearings for the London Plan (LP). We wish to build on our consultation submission by submitting answers to the Inspector’s matters for discussion which accord with our wider policy objectives and, ultimately, persuade the Inspector of the need for amendments to the Plan where appropriate.

The Inspector has published a list of ‘Examination Matters’ for discussion at the public hearings into the LP, and has listed London Councils as a potential contributor to a number of these matters.

The scope of the research is expected to broadly follow the ‘Examination Matters’ which London Councils has selected, as follows:

1. Housing supply and targets (M18)

2. Small sites and small housing developments (M19)

Key priority concerns about reliance on PTAL, outer London and realism of the targets.

3. Housing Size and Mix (M26)

4. Density (M38)

5. Hot Food Takeaways (M61)

6. Air Quality and Water Infrastructure (M70)

7. Transport Scheme and Development (M79)

8. Provision of Transport Infrastructure (M82)

However, this scope may be varied, for example in response to representations from London Boroughs on specific issues or collaborations on other ‘Examination Matters’.

The proposed approach will include:

* Finalising the matters in which London Councils can contribute usefully to LP EiP, based on our earlier consultation submission
* Technical analysis of relevant sections of London Plan
* Technical development of policy and evidence base for London Councils submissions
* Preparation of responses to final matters and preparation for written/oral evidence-giving

Assistance we would request from bidders may include:

* Advice on policy context for proposed alterations and on the types of intervention which may persuade the Inspector
* Similar guidance on evidence base for submissions
* Collating evidence for, and drafting of, specific policy amendments to support and inform the responses to the matters.
* Preparation and presentation of hearing statements and briefing materials to support the matters to which London Councils may choose to contribute

**The Invitation to Tender**

The next stage of the London Plan process is the Examination in Public (EiP), due to commence on 14 January 2019, at which an appointed Planning Inspector will lead discussion. London Councils has been invited to take part in the EiP. We would like to develop the positions set out in our original submission, including preparing specific proposals for policy amendments and the preparation of responses to the matters for discussion, set out by the Inspector. We would also like assistance with the preparation and presentation of evidence at the hearings, including hearing statements and briefing materials for the matters where we will take part.

Bidders will be expected to present their proposed approach in detail including for example:

Policy analysis and development

Bidders should set out in detail how they plan to assist London Councils in building on its submission to the LP consultation with a framework for detailed policy proposals. This may include research into the NPPF and London Plan and commentary on how London Councils may best be able to influence the Planning Inspector to propose amendments to the LP.

Evidence gathering

Bidders should set out how they will gather evidence to support London Councils’ contributions to the LP, including setting out their knowledge and experience of the London planning system and of working with local authorities on planning policy matters, to demonstrate their ability to develop a robust evidence base. Bidders should also set out how they will work with boroughs and other relevant stakeholders in ensuring that any policy proposals and written briefings so far as possible complement boroughs’ own participation in the Examination in Public.

Preparing and Presenting Hearing Statements and Briefing materials

Bidders should set out how they will assist London Councils in preparing and presenting hearing statements and briefing materials in advance of the hearings, in which London Councils expects to participate. Bidders should note the submission deadlines below.

There are three deadlines for the submission of hearing statements:

* 3 December 2018 (for weeks 1-4)
* 17 December 2018 (for weeks 5-8)
* 28 December 2018 (for weeks 9-11)

As the first of these deadlines is near, with the EiP commencing on 14 January 2019, there is a short timeframe for the completion of the initial stages of this work. The overall time span for the work potentially extends to May 2019 when the hearings conclude. **We do not expect to submit any evidence for the 3 December deadline, so we do not expect the appointed contractor to prepare for this deadline.**

*Key Outputs*

Written submissions to and briefing materials for the Examination in Public (EiP) process for the London Plan. Advice and support on London Councils’ participation in the hearings, including the verbal presentation of evidence to the Inspector.

*Expected Outcomes*

* Robust and credible evidence presented to Examination in Public
* Inspector persuaded of case to amend LP to reflect London Councils’ priorities

Bidders are asked to propose an approach, as the methodology for this work will need to be agreed by London Councils.

**Governance and funding**

The primary contacts for this piece of work at London Councils will be Nick Smith, Principal Policy and Projects Officer, who will be the day-to-day contact and Eloise Shepherd, Head of Housing and Planning Policy, who will be the project lead.

**Tender Submission Requirements**

Bidders should provide the following information in their tender submission:

1. Your experience of directly relevant consultancy work
2. Your understanding of the aims and objectives of the project and how it interacts with the current policy context.
3. Your experience of working in the planning sector.
4. An outline of your proposed methodology and approach to tasks outlined in this document.
5. Details of time inputs by individual(s) delivering the tender.
6. Experience of the individual(s), including their role on the project and tasks if relevant (CVs should be included separately in an annex, max 2 pages each).
7. If sub-contractors are to be involved in responses, evidence of their credentials and relevant past experience in this area should be provided.
8. Clear structure of charges including day/hour rates, time spent on tasks, expenses. VAT will be paid at the applicable rate.

We will evaluate your response against the evaluation criteria given below:

**70/30**: 70% quality and 30% cost

| **Evaluation criteria [Quality = 70%]** | **Weighting** |
| --- | --- |
| 1. Understanding of the policy area and London boroughs’ roles and responsibilities, including:   * Expert understanding of planning policy. * Understanding of the London Plan and policies related to it. * A track record of work in this field, and of developing proposals and processes to reflect the circumstances of this policy area. | **40%** |
| 2. The candidate/team’s experience of undertaking similar planning related public examinations. This includes:   * Experience of planning policy analysis and development. * Experience of evidence gathering, including working with stakeholders to ensure policy proposals complement stakeholders’ participation as far as possible. * Experience of preparing and presenting evidence at public examinations. | **40%** |
| 3. A clear methodology and approach to policy analysis, evidence gathering and presentation that meets the project aims and objectives.   * A detailed process and timeline for how the project will be delivered. * An understanding of how the views of the boroughs and other stakeholders will need to be reflected in this process. * An understanding of the threats/risks to delivering this type of project. * Details of any sub-contractors or partners that will be employed to assist with delivering this project (if necessary e.g. for providing legal advice). | **20%** |

**Project Costs and Timetable**

Costs should be clearly presented and be inclusive of all fees, direct and indirect costs, expenses but exclusive of VAT. An example of a clear cost structure is provided in Annex 2. You should indicate based on the timings below how you would envisage the project progressing based on your suggested methodology – a clear and detailed timetable should be provided in your submission.

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Deadline for receiving tender submission | 12 noon, 26 November 2018 |
| Contractors informed of outcome | w/c 26 November 2018 |
| Contract awarded | w/c 26 November 2018 |
| Inception meeting | w/c 26 November 2018 |
| Bulk of project activity | December 2018 to May 2019 |
| Final outputs | Hearing Statements – Dec 2018 and Jan 2019  Presentation of evidence – Jan 2018 to May 2019 |

**Format of Tender submission Response**

If you wish to apply, an electronic copy of your tender submission response should be sent by email to [tenders@londoncouncils.gov.uk](mailto:tenders@londoncouncils.gov.uk?subject=R1018b%20London%20Plan%20Consultancy%20Support%20[insert%20organisation%20name%20here]), quoting reference number **R1018b** to arrive by **12 noon, Monday 26 November 2018**.[[1]](#footnote-1) Bidders should ensure that they have received a confirmation email of receipt of tender submission by the deadline.

**All submission documents should be provided in Microsoft Word format.**

If necessary, you may seek clarification on the procurement process or the specification by contacting Nick Smith via [Nick.Smith@londoncouncils.gov.uk](mailto:Nick.Smith@londoncouncils.gov.uk?subject=R1018b%20Query).

Enquiries will not be answered if received within **2** days of the date for submissions of tenders. Bidders should note that responses to each enquiry will be shared with all organisations bidding (though will not identify the originator of the enquiry).

If you are aware that the submission of your tender submission may give rise to a potential conflict of interest, please inform the officer to whom you are making the application.

***Full instructions to bidders are also provided in Annex One. Bidders are advised to read all instructions before submitting their tender submission.***

**Freedom of Information Act**

You should be aware that the information you submit may be subject to a request for information. The provision of any information to external parties by London Councils is determined by statutory conditions provided for in the Freedom of Information Act 2000.

**Equality Opportunities**

The successful contractor will be required to comply with London Councils’ Equal Opportunity Policy and bidders should complete the Equal Opportunities Questionnaire with their tender submission.

**Terms and Conditions**

Please see accompanying terms and conditions and confirm acceptance in your submission.

**Annex One: Instructions to bidders**

1. **Tender Submissions**
   1. All pages of the bidder’s tender response should be sequentially numbered (including any annexes and supporting documents) and submitted in **Microsoft Word** format.
   2. Bidders are advised to submit tenders by email to [tenders@londoncouncils.gov.uk](mailto:tenders@londoncouncils.gov.uk?subject=R1018b%20London%20Plan%20Consultancy%20Support%20[insert%20organisation%20name%20here]) quoting reference **R1018b**.
   3. The tender must not arrive later than the date and time stipulated. Tenders received after that time may not be considered unless the bidder can prove that the tender was dispatched in sufficient time to meet the deadline.
   4. By submitting a tender, the bidder agrees to keep that tender open for acceptance by London Councils for 90 days following the closing date.
   5. London Councils does not accept suppliers’ Terms and Conditions.
2. **Amendments to Tender Documents**
   1. Prior to the deadline, London Councils may modify the tender documents by amendments in writing. London Councils may extend the deadline for tender to allow for significant amendments to be fully assessed and taken into account.
   2. The bidder may modify the tender prior to the deadline for receipt by giving notice in writing or by email.
   3. No tender may be modified after the deadline for receipt.
   4. The contractor may not transfer, assign or sublet the contract, or any part thereof, without the prior written consent of London Councils. If such consent is given the contractor will remain liable for the performance of the contract in its entirely as if such assignment or sublet had not taken place.
3. **Tender Charges**
   1. Charges must be in pounds sterling and be inclusive of all costs but can be exclusive of VAT.
   2. Charges shall be fixed for the duration of the Contract and will not be subject to any variation unless detailed in the Contract document.
   3. London Councils shall not be liable for any costs incurred in the production of the tender submission.
4. **Tender Evaluations**
   1. London Councils intends to commission the most economically advantageous tender and reserves the right to accept or reject all or any part of any tender.
   2. London Councils does not bind itself to accept the lowest charged tender.
   3. London Councils reserves the right to change the timing or any other aspect of the procurement process or to cancel the procurement process at any stage without prior notice.
5. **Intellectual property rights**
   1. All information provided by London Councils shall be treated by the Contractor as confidential except where prior written consent has been given by London Councils that such information may be disclosed. The dissemination of information within your organisation should be on a need-to-know basis.
   2. All intellectual property rights arising from the work will reside with London Councils.

**Annex Two: Example of cost structure**

**Example of cost table:** Below is an example of a clear cost structure. Other cost breakdowns will be accepted; however a clear structure that will allow London Councils to easily assess value for money – including cost per stage and/or days/hours per person – should be used.

|  |  |  |  |
| --- | --- | --- | --- |
| **Cost:** | | **No of Days** | **£** |
|  | *Breakdown of cost:* | | |
| Preparation work | | days | £ |
| Presentation | | days | £ |
| Meetings | | days | £ |
| Other costs – please specify | | days | £ |
| Travel and other expenses | |  | £ |
|  | |  |  |
| **TOTAL** | | days | **£** |
|  | *Include other items as applicable…* | | |

1. Click on the email link to create an email with the subject heading in the format required by us. The same applies to other email links in this document. [↑](#footnote-ref-1)