

Invitation to quote for Visitor Accommodation Needs Assessment May 2016

Issued by Economic Development & Planning Policy
Neighbourhoods Directorate
Civic Offices
High Street
Epping Essex CM16 4BZ

Introduction

Epping Forest District Council (EFDC) is seeking to commission suitably qualified consultants with a demonstrable track record to undertake an assessment of visitor accommodation needs within Epping Forest District in order to understand whether there will be a need for additional stock over the next 15-20 years. The assessment should address all types of visitor accommodation, including serviced (hotels, pub accommodation and guest house/B&Bs) and non-serviced accommodation (apart-hotels, self-catering, touring caravan and camping sites, newer luxury camping concepts, moorings, youth hostel and group accommodation).

The main driver for this work is the preparation of the new Local Plan for the District and the study will form a key part of the evidence base helping to inform tourism policies in the Local Plan. The current timetable for the new Local Plan proposes consultation on a draft plan in autumn 2016, with submission to the Planning Inspectorate for examination in mid-2017 and adoption of the Plan in 2018. There is a keen interest in growing the visitor economy locally and therefore EFDC is approaching this needs assessment in a holistic manner, recognising for instance that beyond planning policy, the study has the scope to inform broader interventions within the Council. This might, for instance, be through the Economic and Tourism Development Teams or even in relation to the future use of the Council's own assets. There is also scope for the assessment's findings to help inform Development Management's decisions up until the adoption of the emerging Local Plan.

Local Context



Epping Forest District is an area of contrasts. More urban in the south directly abutting London but in stepping beyond the M25 the District becomes more rural in nature. The area has a number of smaller town and population centres such as Loughton, Epping, Waltham Abbey and Ongar but no single higher order conurbation. Around 92.4% of the total District is within the Metropolitan Green Belt.

Planning

The current Local Plan was adopted in 1998 with subsequent alterations adopted in 2006. The Council is currently preparing a new Local Plan for the District which will have a time horizon covering the period up to 2033.

An Issues and Options style public consultation known as 'Community Choices' was undertaken in 2012. The Council is currently working towards publishing a Draft Local Plan consultation document (Preferred Approach) in autumn 2016.

A number of technical studies have been prepared which will inform the preparation of the Local Plan. These can be found here - <http://www.eppingforestdc.gov.uk/index.php/home/file-store/category/105-evidence-base>. Hardisty Jones Associates was commissioned to provide Economic and Employment Evidence to support the Local Plan and within its reporting it outlined that there could be scope for the

development of 150 visitor bedspaces over the new Local Plan period. EFDC is seeking consultants to further advise on this figure, including whether there might be the potential to raise this target with a different approach to planning policy in the new Local Plan and broader pro-active activity by the local authority and partners locally. EFDC is also very keen that the commission goes beyond hotel accommodation to fully understand the potential demand within the District for all other types of visitor accommodation.

Visitor Economy

The Council considers that there is clear potential to develop the tourism sector locally, drawing on the 'green and unique' character of the district. This ambition has gained momentum in recent years with the formation of a district-wide tourism group comprising a wide range of stakeholders as well as EFDC's financial commitment to employ a Tourism Development Manager, albeit on a non-permanent basis.

It is estimated that tourism is worth £198m to the local economy and that the sector is responsible for 2,535 FTE jobs in the District which equates to 7.4% of local employment (2014 figures). Both Epping Forest and the Lee Valley Regional Park (LVRP) provide direct green links into the area from London and offer leisure and recreation activities. Within LVRP on the outskirts of Waltham Abbey (although just outside of the District) is the Lee Valley White Water Centre, host venue for the London 2012 Canoe Slalom events. The District also boasts a built heritage with for instance, Greensted Church - reputedly the oldest wooden church in the world, Copped Hall which staged the first performance of Shakespeare's Mid-Summer Night's Dream, Abbey Church in Waltham Abbey with its links to King Harold and the Epping Ongar Heritage Railway.

Approach and key work strands

The elements highlighted within this section are initial thoughts on how an assessment of this nature could be undertaken. However, proposals to undertake the work should not necessarily be tied to this methodology. If experience from undertaking similar studies suggests that an alternative approach may be more appropriate, please provide an alternative with reasons for suggesting this different approach.

It is essential that the appointed consultants take a sensible approach with regard to boundaries and catchment. Whilst we recognise in terms of direct planning jurisdiction our boundaries are strongly defined, we require that the assessment is approached in a pragmatic way given that accommodation operators and end users (i.e. visitors) are largely blind to local authority boundaries. EFDC is committed to cross-boundary partnership working in many guises in relation to planning and economic development. For example, through the Co-operation for Sustainable Development Member Board & corresponding Officer grouping both having a largely Planning Policy focus. Also, Economic development work at the West Essex level and tourism development work with abutting authorities into Hertfordshire.

The deadline for submissions is Wednesday 25 May 2016 at midday with interviews anticipated to be scheduled in week commencing Tuesday 31 May. It is currently intended that final reporting for the project will be in mid-July in order to fit with the Local Plan preparation timetable, although this may be subject to change. We request that consultants specify in their quote the timetable that they will require in order to successfully deliver the scope of work as outlined and bearing in mind the pressure to see the outcomes of this work as soon as possible in order to aid the Local Plan process.

The six key strands envisaged for the study are set out below. Consultants' proposals will need to clearly set out the methodology for undertaking these strands of work and any other additional/ alternative work that would need to be undertaken to meet the requirements of this study.

1. Context

- Provide a brief higher level introductory context in terms of trends in the visitor accommodation market as relevant to the District.

2. Planning policy

- To briefly reference existing, albeit dated, Local Plan policy relating to visitor accommodation and tourism. Informed by discussion with relevant officers this should be limited to any policies which remain relevant and NPPF compliant in the current day. Undertake an appraisal of the NPPF and any further national or good practice guidance in terms of visitor accommodation and comment as to the implications for EFDC's emerging Local Plan.

3. Supply

- To undertake an assessment of the supply, quality and performance of all forms of visitor accommodation currently available in EFD. This should include serviced (hotels, pub accommodation and B&Bs) and equally non-serviced accommodation (apart-hotels, self-catering, touring caravan and camping sites, newer luxury camping concepts, moorings, youth hostel and group accommodation).
- To build up a picture of the changes in visitor accommodation in recent times and anticipated changes in the pipeline or in the near future. This should include liaison with Development Management and consultation with accommodation providers to understand any investment and growth plans being considered.

4. Current demand

- To ascertain the nature of current demand for visitor accommodation in the District to develop a profile of demand e.g. to understand division between business and leisure visitors and the motivation of these visitors i.e. using as a base from which to explore London, visiting friends/

relatives, access to London Stansted etc. Has the demand profile altered in recent years? Whilst this section could be informed in part by Economic Impact of Tourism modelling we are keen to draw on the experience of existing accommodation providers. It is considered appropriate here to also gauge the views of a cross-section of those locally who generate hotel demand and their experience, whether larger businesses, wedding venues, attractions/ venues (i.e. Lee Valley White Water Centre, Stapleford Aerodrome), key events etc.

5. Potential future demand and soft market testing

- Informed by the preceding baseline analysis, consider how the market potential for a range of visitor accommodation uses might be likely to change over the lifetime of the new Local Plan. Elements to be considered will be explored in greater detail at the point of commission but here we reference some of the aspects we are keen for consultants to tackle just to give a flavour. We would expect the appointed consultants to liaise with appropriate contacts at Epping Forest (City of London Conservators) and LVRP to explore any proposals (regardless of stage in development) for accommodation provision within their respective areas. Common with many public sector organisations, City of London and LVRP are looking to maximise any income streams which are in line with their ethos in order to help in the longer term management and operation of their assets.

The appointed consultants will also be required to explore and actively liaise with local partners and stakeholders to determine if there might be any 'game-changers' in terms of new developments or other activity which might generate new or enhanced visitor accommodation demand during the Plan period. Similarly, we need to consider what level of demand for visitor accommodation might be generated from increasing passenger movements at Stansted Airport.

EFDC is seeking consultants with planning and tourism expertise but also a strong commercial knowledge. If early stage work points to the market potential for new accommodation provision, we will expect the appointed consultants to take this a stage further and identify types of potential operators and liaise with them to gauge opinion and interest.

6. Recommendations

- To provide guidance on the potential for growth in visitor accommodation over plan period, including what type of provision and where. Whilst we would not expect this to involve the detailed assessment of individual potential sites we are seeking advice and recommendation as to what types of additional accommodation might be appropriate within different areas of the district.
- To set out potential options for planning policy development to enable appropriate serviced and non-serviced visitor accommodation growth in the District (including where appropriate draft policies).
- To inform planning policy on the retention of visitor accommodation uses (i.e. against pressure for other higher value uses) – as much as this is permissible within the NPPF structure.
- To provide interim guidance and a framework for Development Management Officers in terms of dealing with pre-application approaches and applications for visitor accommodation before the new Local Plan is adopted.
- To provide guidance on other interventions the Council and partners can take to support the delivery of further visitor accommodation to strengthen the local visitor economy.

Stakeholder Engagement

Active engagement is crucial to the success of this piece of work. The commissioned consultants will need to work closely with Officers within EFDC and the Visit Epping Forest Tourism Board. We will also expect the consultants to meaningfully engage with operators of visitor accommodation locally and those identified as potentially generating significant demand for accommodation locally. Furthermore, the appointed

consultants will need to secure input from stakeholders such as City of London (Epping Forest), LVRP, Harlow Enterprise Zone, Stansted Airport, Invest Essex and Visit Essex and adjoining authorities. As referenced earlier in the document, we are seeking consultants with a strong commercial awareness of the visitor accommodation sector and so would expect the appointed consultants to be able to draw on a broad range of developer and operator contacts to ensure a strong output.

Submission of proposals

To successfully submit a proposal, the applicant must set out in writing:

- The proposed study methodology for meeting the requirements of the project brief.
- A project plan for the study with key milestone dates and details of any information required from EFDC and the timescales for supplying this.
- Names of all staff working on the project (i.e. project team, project lead and their seniority including CVs, qualifications and track record on at least two similar example studies within the organisation), their daily rates, the number of consultancy days allocated to each component of the project for each staff member. This should include details of any intention to contract out elements of the study.
- An outline of at least two similar successfully delivered projects and contact details (including phone/ email) for a referee from each commission.
- A fixed price quote that includes the full costs of the project including consultancy time (also including daily rates), the supply of 10 printed and bound final reports (plus electronic version), fieldwork costs and the costs of travel, subsistence and any other anticipated expenses.
- The applicant must declare that there is no conflict of interest with a third party or other study that would compromise the integrity of the study. Complete form at the end
- Completion of enclosed form relating to insurance to confirm that the consultant has public indemnity, public liability and employers' liability insurance that meets the Council's required standards.
- Completion of enclosed Certificate that the quote is a bona fide quote and Formal declaration of offer forms.

Please provide all information as outlined above. Supplementary information will only be accepted where it is properly referenced to the 'asks' above and should also be clearly marked with the name of your company. Information provided but not properly referenced will not be taken into account and will not be scored.

Please return your quote electronically, including all supporting documentation by 12 noon on Wednesday 25 May 2016.

Guidance notes

The information disclosed in response to this Invitation to Quote will be used in the selection of consultants to undertake a visitor accommodation needs assessment for Epping Forest District.

Please note that whenever used in this Quote, the term "company" refers to a sole practitioner, partnership, consortium, incorporated company, co-operative, charity or analogous entities operating outside the UK, as appropriate, and the term "officer" refers to any director, company secretary, partner, associate, trustee or other person occupying a position of authority or responsibility within the firm.

Unless instructed otherwise when providing information, please give details which specifically relate to your company, not to the whole of the group if your company forms part of a group.

Please include, where appropriate, any supporting documents, marking clearly on all attachments the name of your company and to which aspect/s of the quote they refer.

Award & evaluation of contract

The following criteria will be scored: Proposed Approach/Relevant Experience/ Ability to deliver within timescales

ITQ Scoring Sheet	
Classification	Score
Excellent - meets and exceeds all the requirements and demonstrates added value	5
Very good – meets and demonstrates achievement of all the requirements	4
Good - meets most of the requirements	3
Poor - meets some of the requirements	2
Very poor - meets only a very few of the requirements	1
Unacceptable - meets none of the requirements / no information provided	0

The Contract will be awarded on the basis of the most economically advantageous quote by applying the following weightings. However, failure to meet the Council's requirements may result in your bid being rejected. Please note that evidence of compliance will be required.

Evaluation Criteria	Weighting (%)
Proposed Approach/Relevant Experience/ Ability to deliver within timescales Within your response please detail all of the elements / stages required in undertaking this project in order to meet the brief. Your response should include the full methodology / approach you will undertake to complete this project and should also include a full and accurate timetable for completion. Bids should demonstrate the relevant expertise and experience of the team and any proposed sub consultants, including track record in delivery of comparable projects.	60
Contract Price:	40

The overall top scoring submission based on all evaluation elements will, subject to successful interview, be awarded the contract.

The Council will not be obliged to select the lowest or any quotation. All Consultants' total prices, will be added together and then divided by the number of returns received. This will create a 'mean' figure against which the Consultants' price bids will be scored against accordingly. The 'mean' figure will attract a score of 20% with Consultants' bids then ranked in accordance to this figure. An example of this would be if your total fixed price bid is 20% lower than the mean then your bid would score 24% and conversely if your bid was 20% more than the 'mean' figure then your bid would score 16%. Ultimately a maximum score of 40% is achievable should any bid come in at a zero cost.

The resultant percentage scores will be transferred across to the overall evaluation model.

Clarifications & return of quotes

This quote process is being managed by Epping Forest District Council. All requests for additional information or clarifications should be directed by email to: vwillis@eppingforestdc.gov.uk not later than 7 days before the due date for the return of the quotes. The Council will send any clarifications raised, together with replies given, to all bidders.

Please note that any queries / clarification requests should be made by 12 noon on Wednesday 18 May 2016.

Please note that the return date for submissions is 12 noon on Wednesday 25 May 2016.

Return to: Vicki Willis – vwillis@eppingforestdc.gov.uk
Economic Development
Epping Forest District Council
Tel: 01992 564593

Please mark the email: 'ITQ – Accommodation Needs Assessment - EFDC.'

EFDC is not bound to accept the lowest priced bid. Quotes will be evaluated in accordance with the criteria stated within the above specification.

Freedom of information

As part of our duty under the Act, when a Freedom of Information request is received, we may have to disclose information that forms part of your ITQ, quote, bid or associated documentation unless an exemption applies as defined by the Act.

There are, for example, exemptions:

- against disclosing information where that would constitute an actionable breach of confidence
- against disclosing trade secrets
- against disclosing information likely to prejudice any person's commercial interests (and this includes the Council's commercial interests).

The Council will be mindful of the potential commercial risks to you as a prospective Consultant and will comply with its obligations of confidentiality where they arise, subject to its legal obligations.

If you consider that any of the information you submit to the Council should not be disclosed because of its sensitivity, then this should be stated with the reason for believing it to be exempt in accordance with the Act. The Council will then, in future, seek to consult with you in considering any Freedom of Information request received, before replying to the request within the mandatory timescales.

It should be noted, however, that disclosure is assumed to be required under the law unless an exemption under the Act can be applied and, subject to the enforcement role of the Information Commissioner, the Council has to make a judgment as to the applicability of any exemption on the basis of all the facts in its possession, including its assessment as to whether there is a public interest in such disclosure.

Insurance information

Please note the Council requires the following Insurance cover levels for this contract. Please provide copies of your latest certificates with your submission.

Professional Indemnity Insurance: £ (Limit of Cover)

Insurer: _____
Policy No: _____
Expiry Date: _____ (Please supply copy)

Please note Epping Forest District Council requires a minimum of £2million cover.

Public Liability Insurance:	£	(Limit of Cover)
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Insurer: _____
Policy No: _____
Expiry Date: _____ (Please supply copy)

Please note Epping Forest District Council requires a minimum of £5 million cover.

Employers Liability Insurance: £ (Limit of Cover)

Insurer: _____
Policy No: _____
Expiry Date: _____ (Please supply copy)

Please note that Epping Forest District Council requires a minimum £10 million cover.

Please note that should your submission be successful but you do not currently have the required levels there will be an expectation that you obtain them prior to award. Please use the comment box below to confirm your acceptance to this position. Failure to do so will result in your bid being rejected.

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Certificate that the quote is a bona fide quote

WE CERTIFY THAT:

1. The quote submitted herewith is a bona fide quote, intended to be competitive.
2. We have not fixed or adjusted the amount of the quote under or in accordance with any agreement or arrangement with any other person.
3. We have not done and we undertake that we will not do at any time before the hour specified for the return of the quote any of the following acts:
 - (a) communicate to a person other than the person calling for this quote the amount or approximate amount of the proposed quote (except where the disclosure, in confidence, of the approximate amount of the quote was essential to obtain insurance premium quotations required for the preparation of the quote);
 - (b) enter into any agreement with any other person that he/she shall refrain from quoting or as to the amount of any quote to be submitted;
 - (c) offer or pay or give or agree to give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other quote or proposed quote any act or thing of the sort described above.

In this certificate:

- i). "person" includes any person and anybody or association corporate or incorporate.
- ii). "any agreement or arrangements" includes any transaction of the sort described above, formal or informal and whether legally binding or not.

DATED this day of 2016

SIGNED (as in quote) _____

duly authorised to sign
for and on behalf of _____

Name _____

Designation _____

Formal declaration of offer

Quote for: Visitor Accommodation Needs Assessment

I (*Note: Insert Name*) certify that I am a person duly authorised to sign quotes for and on behalf of:

Company Name: (*Note: Insert Name of Company*)

and having read the Invitation to Quote documents, offer to supply the services as specified in the Invitation to Quote.

Under the terms and conditions included in the Invitation to Quote documents;
In accordance with the specification stated in the Invitation to Quote documents;
At the price (or prices) and at the delivery time (or times) or by the completion date stated.

It is confirmed that all and any information which Epping Forest District Council may request from this Company will be provided by the Company within 30 days from the date of the request.

Our offer is valid for (*Note: Insert number of days*) unless this period is extended by mutual agreement.

Authorised Signatory: _____

Name in (block letters): _____

Address: _____

Position in Company: _____

Telephone Number: _____

Fax Number: _____

E-mail: _____

For and on behalf of: _____

Company's Name: _____

Address: _____

Company's Registration Number: _____

Companies Unique Tax
Reference (UTR) _____

VAT Number _____

Date: _____