

Tender Specification

Oxford Green Belt Study

Introduction

1. On behalf of the Oxfordshire local authorities¹ (the Commissioning Local Authorities), Oxfordshire County Council wishes to commission a strategic assessment of the Oxford Green Belt.
2. This project will be part of a wider joint strategic work programme, the purpose of which will be to inform local plan reviews by identifying and appraising strategic spatial options for accommodating the county's long-term growth needs.
3. The establishment and maintenance of Green Belts has long been a part of national policy to prevent urban sprawl by keeping land permanently open. The government continues to attach great importance to Green Belts: once established, Green Belt boundaries should only be altered in exceptional circumstances through the review of a local plan.
4. A map showing the extent of the Oxford Green Belt is provided at Annex 1.
5. The study will provide an understanding of:
 - a. how different parts of the Oxford Green Belt fulfil or do not fulfil the various purposes of Green Belt designation;
 - b. which parcels of Green Belt land (if any) could be considered by the local authorities for removal from the Green Belt, having regard to a) above; &
 - c. whether any additional land should be considered for inclusion within the Green Belt, having regard to advice set out in the NPPF, as relevant
6. This brief outlines what the six Councils expect of the project and the detailed requirements of tender proposals.

Background

7. The Oxfordshire Strategic Housing Market Assessment (SHMA) was published in April 2014. This identified a need for the provision of around 5,000 homes p.a. over the period 2011-31 across the Oxfordshire Housing Market Area.

¹ Cherwell District Council; Oxford City Council; Oxfordshire County Council; South Oxfordshire District Council; Vale of White Horse District Council; West Oxfordshire District Council

8. The need within the administrative area of Oxford City Council is identified as between 24,000 and 32,000 homes up to 2031. Although the Oxford Core Strategy has not yet been formally reviewed in the context of the SHMA, there is general agreement between the local authorities that the capacity of the City is limited and that there will in consequence be a significant shortfall which will need to be met within neighbouring districts (see also below).
9. At its meeting in November 2014, the Oxfordshire Shadow Growth Board² endorsed the following key principles to underpin all post-SHMA work:
 - a. The District Local Plans are sovereign and all work should feed into Local Plans for them to determine the spatial future of the districts;
 - b. A recognition that the work must be collaborative and joined up to provide a county wide spatial picture and strategy;
 - c. A recognition therefore that joint work on future spatial options, transport infrastructure and green belt will be required to feed into Local Plans;
 - d. Recognition that the City cannot fully meet its housing needs and there is a need to agree on the level of unmet need. However work on determining spatial options in Local Plans can commence alongside this;
 - e. A wish that the timescale for completing the Review is 12-18 months and that this should not hold up Local Plan timescales
10. Reflecting these principles, officers of the six authorities have since drawn up a strategic work programme, which comprises a number of inter-related projects and milestones around the preparation and appraisal of long-term strategic development options for the county and the identification of associated infrastructure requirements. These projects will run over the spring and summer months of this year - aided in the latter stages by a “critical friend” review³ - and will culminate in the agreement of a new housing distribution for Oxfordshire by the early autumn. That agreed distribution will then be taken forward in subsequent Local Plan Reviews by the individual District Councils.
11. An important aspect of the joint programme and its component work streams (of which the Green Belt Study will be one) is to provide evidence that the local authorities have complied with the Duty to Co-operate requirements in preparing their respective Local Plans.

Purpose of the Study

12. The primary function of the Study is to assess the land within the Oxford Green Belt against the national purposes of Green Belts set out in paragraph 80 of the NPPF, which are:
 - to check the unrestricted sprawl of large built-up areas;

² The Growth Board comprises representatives of the County and District Councils of Oxfordshire, the Oxfordshire Local Enterprise Partnership, the Universities of Oxford and business leaders

³ The independent “critical friend” will be appointed within the next few weeks

- to prevent neighbouring towns merging into one another;
 - to assist in safeguarding the countryside from encroachment;
 - to preserve the setting and special character of historic towns; and
 - to assist in urban regeneration, by encouraging the recycling of derelict and other urban land.
13. The Study should also examine the case for including within the Green Belt (possibly in the form of “Green Wedges”) any additional areas of land that currently lie outside it, having regard to existing national advice as relevant.
 14. The outputs of the study will enable the local authorities to consider the extent to which some existing Green Belt land could be used to accommodate sustainable forms, patterns and types of new development, should the required exceptional circumstances exist for such a course of action.
 15. However, and for the avoidance of doubt, it will not be the purpose of the Green Belt Study itself to advise on the suitability or potential of land in the Oxford Green Belt for development.
 16. Neither should the Study have regard to such other environmental, policy or land-use constraints and designations as may exist within the Oxford Green Belt – i.e. landscape areas, SSSIs, floodplains etc. - except insofar that any of these are considered by the consultant to be relevant in Green Belt terms.
 17. As indicated earlier, the matters referred to in paragraph 16 above will be addressed by the local authorities in separate exercises involving the development and appraisal of future strategic development options over the coming months. The emerging draft and final outputs of the Green Belt Study will, however, be an important consideration in those exercises.

Scope of the Work

18. The Study should provide a robust, transparent and clear understanding of how the land in the Oxford Green Belt performs against the purposes of Green Belts and how any adjoining land with potential for inclusion within the Green Belt would fulfil those purposes.
19. The Study will be a technical document that will be used to help inform decisions about potential changes to the Green Belt boundary in Oxfordshire. In circumstances that would comply with the requirements of the National Planning Policy Framework and national planning guidance, the Study’s outputs will also be used to help inform decisions about the location of future development.
20. It will be the role of the emerging Local Plan reviews to formally revise Green Belt boundaries (should there be an exceptional case for doing so), to identify any need for safeguarded land, and to allocate new development sites, having taken into account all relevant planning considerations.

Methodology

21. Although there is no specific statutory guidance on how Green Belt assessments should be undertaken, the Study should be prepared (but without limitation) in line with the NPPF and extant Planning Practice Guidance. Regard should also be paid as appropriate to any examples of “best practice” and any lessons to be learned from similar studies elsewhere.
22. Following on from the above, some individual local authorities have already prepared or commissioned, or are in the process of preparing/commissioning, their own Green Belt studies to inform their Local Plan work. In Oxfordshire, South Oxfordshire District Council, the Vale of White Horse District Council and Oxford City Council are all in that position. Reference should therefore be made to material produced by or for these authorities as appropriate⁴.
23. As indicated above, the Study should assess the performance of different component areas of the Oxford Green Belt against the five Green Belt purposes set out in the NPPF, using robust and transparent local assessment criteria. Likewise, any land which the consultants may wish to suggest for inclusion with the Oxford Green Belt should be the subject of a similar approach. It is considered very unlikely that these assessments could be undertaken solely as a desk-based exercise hence site visits will be required.
24. In common with the approach taken in similar studies undertaken elsewhere, the Study should identify discrete land parcels within the Green Belt, for assessment. These parcels may be formulated by reference to physical features such as roads, rivers, or field boundaries - or to such other criteria as the consultant considers appropriate.
25. Submissions should include an in-depth description of the methodology to be used in defining the land parcels. The methodology should also describe the approach that would be taken to the subsequent assessment and rating of the defined land parcels against the national purposes of Green Belts and by extension, their relative degrees of importance in Green Belt terms.
26. The Project Steering Group will wish to be provided with an opportunity to comment on and agree the land parcels with the appointed consultants, on behalf of the commissioning local authorities, at an early stage of the project. The indicative timetable at paragraph 41 suggests an appropriate time for this, the precise date of which will be subject to final agreement at the Inception Meeting.
27. It would also be helpful if Bidders could include a broad, preliminary estimate of the number of separate land parcels that may be assessed in the study and the likely average parcel size, having regard to the intended use of the Study’s

⁴ Available through the relevant members of the Project Steering Group (refer paragraph 37 below)

outputs as summarised at paragraph 19 above. For information, the total extent of the Oxford Green Belt is approximately 67,000 hectares.

Key Outputs

28. The Study should:

- Set out and clearly justify the methodology for the assessment;
- Use the methodology to identify parcels of land for assessment, parcels to be plotted on an OS map base at an appropriate scale;
- Clearly document the assessment process, robustly justifying the conclusions reached for each land parcel ; &
- Include a glossary defining terms such as ‘towns’ and ‘built-up areas’ in the Oxfordshire context.

29. Six hard copies of the completed Study should be made available (one per authority), together with electronic versions in Microsoft Word and as a PDF.

30. Six copies of a non-technical summary should also be provided to accompany the final version.

31. All data and GIS polygons should be made available to each member of the steering group and supplied in appropriate format.

Working Arrangements

32. Reporting to the Oxfordshire Growth Board and its associated Governance arrangements, Oxfordshire County Council will be the Project Lead on behalf of the commissioning local authorities, representatives of which will together comprise the Project Steering Group. The consultants will be expected to work closely with the Project Steering Group and to provide a single point of contact. Day to day liaison will be through the Client Project Manager.

33. The consultant will keep the Client Project Manager informed at all stages of the study and should provide a regular flow of information on the progress of the project against the timetable, any issues or difficulties arising, and proposals for their resolution, including details of their effect on the timetable. Regular written progress reports in accordance with the agreed Project Implementation Plan should also be provided by the consultant for the collective benefit of the commissioning local authorities.

34. Should the consultant need to liaise face-to-face with officers at individual authorities in respect of specific, localised data or to more fully understand the local context, contact should first be made through the Client Project Manager. Where correspondence is undertaken in an electronic format the Client Project

Manager should be copied in. Contact details for members of the Project Steering Group are provided below.

35. It should be noted that the nature of this commission is highly politically sensitive. The selected consultant should observe strict confidentiality throughout the commission with circulation of correspondence or material relating to the work outside of the Project Steering Group is not permitted without prior agreement with the Client Project Manager.
36. It is expected that the consultant will meet the Project Steering Group on at least three occasions prior to the submission of the draft Final Report. Meetings will occur at appropriate stages throughout the study (including the Inception Meeting) and regular fortnightly email updates should be provided to the Client about the progress of the project. This is aimed at preventing slippage and to identify any issues that need to be resolved at an early stage.
37. The following persons will comprise the Project Steering Group on the client side :

Authority	Name and Job Title	Contact details
Oxfordshire County Council	Chris Kenneford Service Manager, Planning Regulation (Project Manager)	chris.kenneford@oxfordshire.gov.uk Tel. 01865 815615 Mob. 07825 052783
Cherwell District Council	Adrian Colwell Head of Strategic Planning & Economy	Adrian.Colwell@cherwellandsouthnorthants.gov.uk Tel. 01295 227985 Mob. 07725 781624
Oxford City Council	Matt Bates Principal Planner, Planning Policy	mbates@oxford.gov.uk Tel. 01865 252277 Mob. 07881 311677
South Oxfordshire District Council	Beryl Guiver Principal Planner	beryl.guiver@southandvale.gov.uk Tel. to be notified Mob. To be notified
Vale of White Horse District Council	Sophie Horsley Planning Policy Manager	Sophie.Horsley@southandvale.gov.uk Mob. 07801 203608
West Oxfordshire District Council	Chris Hargraves Planning Policy Manager	Chris.Hargraves@westoxon.gov.uk Tel. 01993 861686
Oxfordshire Growth Board	Paul Staines Programme Manager	paul.staines@westoxon.gov.uk Tel. 01993 861695 Mob. 07894 475714

38. The draft final report will also be the subject of a review by an independent “Critical Friend” selected by the local authorities (refer also paragraph 10 above). The critical friend will be engaged to prepare a critique of the spatial options for growth and the conclusions of the Green Belt Study will be one important aspect

of this. The appointed consultant may accordingly be required to engage with the critical friend in the later stages of the Study, and potentially to attend and assist at a “Check and Challenge” workshop with the local authorities (see also below).

Timescale

39. It is crucial that the first complete draft of the Study is submitted by 30 June 2015, with the final version to be completed by 31 August 2015. Accordingly, time will be of the essence in relation to delivery of the Project and achievement of the respective Milestones. The consultant should demonstrate that it has the necessary capacity and expertise to meet these deadlines.
40. In addition to the Project Steering Group, the progress of the Strategic Green Belt Study will also be monitored by the overarching Oxfordshire Growth Board and its Executive Officer Group, which are responsible for managing the delivery of cross county projects specified as priorities in the Oxfordshire Strategic Economic Plan.
41. A detailed project plan will be agreed after the consultant has been appointed, including meetings with Steering Group; however, an indicative timeframe for the Study is set out below:

Deadline for Tender Submissions	Thursday 12 March 2015
Interviews	Friday 20 March 2015
Appointment of Consultants	Tuesday 24 March 2015
Inception Meeting with Steering Group	Monday 30 March 2015
Meeting with Steering Group to agree land parcels	April 2015 ⁵
Progress meeting with Steering Group	May 2015 ⁶
Progress meeting with Steering Group	June 2015 ⁷
Submission of 1 st Draft Report	30 June 2015 ⁸
Check & Challenge workshop with local authorities	July 2015 ⁹
Critical Friend review of Draft Report	July 2015 ¹⁰
Refinement & Submission of Final Report	31 August 2015

The Tender Submission

42. The following should be included in tender submissions:

- Evidence of the consultants’ understanding of the Study brief;
- Detailed methodology to be used and format;
- An outline of the work programme including identification of key stages;

⁵ Date to be agreed at Inception Meeting

⁶ As above

⁷ As above

⁸ As above

⁹ Date to be agreed by Oxfordshire Growth Board

¹⁰ As above

- Summary CVs of the staff that will work on the Study, their role and an indication of the amount of time (in days) that each will be working on it;
 - Examples of any relevant previous work, including any Green Belt studies or reviews for other authorities;
 - A timetable of work based on meeting the deadlines set out above;
 - An indication of any information or support required from the client; and
 - At least 2 references of relevant work previously undertaken.
43. Tenders should also include good practice project management including frequent communication on progress towards timescales and any contingencies to deal with unforeseen delays. Elements of this will be agreed at the inception meeting with the successful consultants.
44. If it is proposed to sub contract any elements of the study, the company concerned should be identified, together with details of the relevant individuals. Information in respect of experience, hourly rates and the role of these individuals within the study should also be identified. Prior to any element of the study being sub-contracted consent of Oxfordshire County Council will first be required..
45. **Tenders must be submitted by mid-day (12.00) on Thursday 12 March 2015.**

Information to be provided by the Authorities

46. At the beginning of the Study each authority will provide the appointed consultants with the following information:
- Green belt boundaries as a GIS layer;
 - Existing settlement boundaries as a GIS layer;
 - Relevant information on any proposals to change the Green Belt boundary which are currently being taken through the local plan process

Selection

47. In evaluating tenders, the Steering Group will seek the best value for money. The following criteria and weightings will apply:

Criteria	Weighting
Price	35%
Clarity of submission and understanding of the brief	20%
Quality of proposed methodology	20%
Relevance and quality of previous experience	15%
Quality, experience and availability of staff	10%

48. To ensure fairness and transparency the assessment will be undertaken against an appraisal matrix, which will take account of the specific weightings identified above. The Steering Group is not bound to accept the lowest or any quotation.
49. Consultants should confirm that there would be no current, potential or perceived conflict of interest in their carrying out the project. If there are any such conflicts now or any arise at a point before or during commission, the consultants must explain what safeguards would be put in place to militate against the risks of conflict of interest.
50. Should it be deemed necessary, references may be taken up to help the local authorities commission the preferred consultant.
51. Unsuccessful applicants will receive feedback to their applications upon request.

Contract

52. The contract will be let by Oxfordshire County Council on a fixed price contract, (subject to achievement of the Project Milestones) including all appropriate expenses and costs.
53. The contract will be let in accordance with Oxfordshire County Council's terms and conditions.
54. Final payment will only be made upon the completion of the project to the satisfaction of the Commissioning Local Authorities.
55. The copyright of the final report and any appendices or other supporting information /outputs (including GIS data and associated databases) must be assigned, at no additional cost, to the Commissioning Local Authorities without any reservation.

For any questions relating to the content of this brief, please email:

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Oxford Green Belt

