

Schedule 1

An economic, social and cultural impact assessment framework for the Jurassic Coast World Heritage Site (JCWHS)

12/11/07

1. Introduction

The Jurassic Coast World Heritage Team (the client) wish to create an economic, social and cultural impact assessment framework for the Dorset and East Devon Coast (Jurassic Coast) World Heritage Site. Dorset County Council will issue the contract on behalf of the client.

The broad aim of this impact study will be to assess how effectively the outstanding natural environment of the Jurassic Coast may drive economic, social and cultural regeneration within the surrounding area.

This brief invites suitable applicants to apply to undertake this study. Applicants must indicate how they would undertake this task, which will involve two parts:

- A) Production of a study measuring the economic, social and cultural impact of the wide range of activities stimulated by the catalyst of World Heritage Site designation, including those deriving from the site's management plan and ensuing programme of partnership work, from designation in 2001 to date
- B) Creation of a Monitoring and Evaluation Framework for the South West Regional Development Agency (SWRDA) funded Jurassic Coast Framework Programme (JCFP), within the context of the broader ongoing management and work programme of the World Heritage Site

Applicants may choose to undertake the whole study directly through their own resources, or alternatively may choose to contract and manage other specialists to undertake elements of the required work. However the successful applicant will remain entirely responsible for coordination and delivery of the complete study.

2. Context

In 2001 the Dorset and East Devon coastline was designated as England's only natural World Heritage Site by UNESCO. The 'Jurassic Coast' extends from Exmouth in East Devon to Studland Bay in Dorset, and its Outstanding Universal Value is that it has the most complete and near continuous record through the Triassic, Jurassic and Cretaceous periods anywhere in the world, showing 185 million years of Earth History and evolution in just 95 miles of coast. Put simply, a walk along the coast is a walk through time.

Since designation, the Jurassic Coast has become increasingly a part of life, and a source of significant pride, for people in Dorset and East Devon. It is also seen to be projecting the Earth Sciences into the public consciousness through a natural protected area, in a way unprecedented in England. It is enabling communities, businesses, agencies and individuals to build on the strength and value of the designation (the brand identities of UNESCO, World Heritage and The Jurassic Coast) to promote social, economic and cultural development the length of the coast. Events such as the Lyme Regis Fossil Festival exemplify on a small scale how this significant opportunity can be maximised, and the Site's designation has also been warmly embraced by the education community, locally and nationally.

Importantly, the aspirational themes of Quality, Integration and Sustainability run throughout all the initiatives undertaken in support of the Site's objectives. Specifically, the designation has

provided the opportunity to develop an integrated destination built on firm principles of sustainability and community cohesion, which can lead to a year round tourism and knowledge-based economy using the outstanding and globally recognised natural environment as a driver.

Although there is some evidence to support these claims, no systematic work has been undertaken to clearly demonstrate impacts (positive or negative) of the designation on the area. There is a clear need for this at the current stage of the work programme.

The quote: *"We aspire to be the leading regional and national example of how achieving the conservation, understanding, enjoyment and sustainable use of the environment can also lead to economic and social development"* from the Site's Framework for Action (2003) best summarises what the work programme for the site is trying to achieve.

Full details of the Site, the Management Plan and structures, and the range of work undertaken in support of the World Heritage designation can be found on www.jurassiccoast.com, in the section relating to Site Management.

3. Jurassic Coast Framework Project (JCFP)

In 2006, Dorset County Council, on behalf of the JCWHS Steering Group, signed a 'framework agreement' with the South West Regional Development Agency for a £7.1m package of funding in support of a range of projects along the Jurassic Coast WHS.

The majority of the funding in this package will support the development of refurbished or new visitor facilities for interpretation of the Jurassic Coast WHS and a range of important other local interests (e.g. Exe Estuary wildlife). These new 'visitor centres' are being developed through community, Local Authority and in some cases private partnerships, at Swanage, Weymouth, Portland, Lyme Regis, Seaton and Exmouth.

All projects are grounded in the community and will have strong local ownership. Together, they will form a linked network of high quality interpretation facilities that can be of benefit for visitors and residents alike. Although they are being developed separately and on different timescales, there is a central level of coordination from within the Jurassic Coast Team, to ensure consistency of message, control of brand use and Intellectual Property relating to the World Heritage Site. They are also all being developed with a view to being financially self-sustaining, and without a reliance on local authority or regional agency revenue support.

The central premise behind the funding agreement with SWRDA is that, whilst the Jurassic Coast itself is the primary asset, or attraction, there is a very strong need for high quality visitor facilities to engage people, link them to the coast, and to encourage them to come back again and again, and at different times of year. Over five years, the projects will create a network of world class visitor facilities the length of the coast, linked together through the Jurassic Coast brand and ideals, and promoting innovation, business development and community cohesion. Each centre will be distinct and unique, and will encourage visitors and residents to visit the other facilities in the network at another location along the coast, preferably through a sustainable form of transport.

So in every sense the project is helping to create a new and joined up destination, and reap the economic, social and cultural benefits that successful (and sustainable) destination development can bring. Although the brand development and very wide range of other work undertaken since 2001 (see Five Year Report, on website) has already gone a long way towards doing this, there are not yet the built facilities to match visitor and resident expectations.

In addition to the capital projects within the JCFP, there are a number of revenue projects that are running in support of these: support for the Jurassic Coast Trust; funding of a Quality Business Scheme; and a capacity building project. The JCFP also provides some core funding for the

Jurassic Coast Team and has an indicative amount available for some technology driven work to be developed in coming years.

The initiative for this brief came from the need to establish a monitoring and evaluation programme for the JCFP. Monitoring and evaluation is required not only as a project management tool (e.g. in planning, forecasting, performance management and best practice transfer), but also to ensure accountability to the donor (eg SWRDA and other project sponsors) and to project recipients, the wider public (taxpayer) and other stakeholders.

Monitoring and evaluation for the Jurassic Coast Framework Project will comprise three elements:

- a. Internal project monitoring: the continuous and systematic collection and analysis of information to assess project progress towards planned milestones and targets.
- b. Impact assessment: the subject of this brief
- c. Periodic external evaluation: assessment, as systematic as possible, of the ongoing or completed project or programme (important for both internal learning and accountability).

Whilst monitoring and evaluation of the JCFP is still a core reason for the study, it is vitally important to establish an understanding of the context and to establish a baseline against which future progress can be measured. In order to do this it is necessary to step outside of the confines of the JCFP and examine the broader economic, social and cultural impact of the very wide range of work that has been undertaken since World Heritage designation. It is a requirement that the indicators identified can be used for baseline purposes, and can also continue to be utilised for future impact assessment through ongoing internal monitoring.

The JCFP business plan will be sent to all short-listed applicants by way of further information.

4. Details of the Task

The task will involve the production of two elements:

1. A study measuring the economic, social and cultural impact of the wide range of activities stimulated by the catalyst of World Heritage Site designation, including those deriving from the site's management plan and ensuing programme of partnership work, from designation in 2001 to date.
2. A Monitoring and Evaluation Framework for the South West Regional Development Agency (SWRDA) funded Jurassic Coast Framework Programme (JCFP), within the context of the broader ongoing management and work programme of the World Heritage Site.

4.1 Rationale

The following are the main reasons for undertaking this task:

- To increase understanding of the impacts of the range of work stemming from the designation and management of the JCWHS, enabling key learning points to be identified for focusing and targeting future work more effectively
- To be able to demonstrate the impacts clearly and show supporters (current and future) the value of the work undertaken, and the benefits created by their investment
- To develop and implement an effective system for the ongoing monitoring of the £7.1m JCFP projects agreed with SWRDA in 2006
- To contribute to national and international debate on the costs and benefits of World Heritage Status
- To generate additional evidence in support of a review of the Site Management Plan

4.2 Scope

The task must answer the following five key questions:

- A) What are the potential economic, social and cultural impacts which can result directly or indirectly from WHS designation?
- B) What are the characteristics of these impacts and how can they be measured?
- C) To what extent have these impacts already occurred or taken effect?
- D) To what extent may some or all of these impacts have occurred without WHS designation (deadweight)?
- E) What framework can be established for the ongoing evaluation of the JCFP, using the baseline and indicators established through answering questions A) - D)?

4.3 Approach

This task will involve specific operational research to answer the questions identified above, and will need an innovative and multidisciplinary approach. Whilst some of the indicators may involve the use of standard economic models or statistics, many may require a more qualitative approach. Whilst the bulk of the Jurassic Coast Framework Project is aimed at improving infrastructure developments which tourists will visit, these are carefully called 'visitor facilities' and not 'tourist attractions' as their impact on the community can be seen as much greater than that. Furthermore, work undertaken outside the JCFP covers education, conservation, interpretation, sustainable tourism and transport, access improvements and partnership development. All of these are likely to have had an impact, and have been undertaken directly as a result of WHS designation.

Key issues that will need to be considered include:

- Key tourism factors, such as raising the 'quality' of the visitor experience, creating a year-round offer and encouraging repeat visitors
- Increased local community and business activity – adding value
- Support for community regeneration and cohesion
- Skills development and dissemination
- Support for innovation and business development
- Spreading best practice widely
- Social and cultural benefits
- Tangible and intangible impacts
- Potential displacement from existing similar attractions and facilities within the defined geographical area of study

The study should also consider how the WHS designation has:

- created **confidence** in the prospects for local growth;
- provided **strategic leadership** (of stakeholders);
- exerted **strategic influence** (over key partners and stakeholders);
- **levered** investment from other sources;
- **developed synergy** (in activity of RDA partners, stakeholders and target audiences);
- stimulated a **scaling up** of beneficial activity; and
- **enhanced the quality** of desirable economic activity

Whilst it will be an early task of the successful applicant to identify indicators and develop their proposed model, the following table gives an indication of the type of key criteria we would be looking at, and potential characteristics and indicators.

Category of Impact	Examples of Sectors, characteristics or indicators
1. Economic activity	Directly tourism-related: accommodation, tours, packages, websites, boat operators, overall 'quality' improvement. Indirectly or non-tourism related such as retail, catering, industry (e.g. quarrying) and marine activities such as Sunseeker, ports etc. Indicators might cover direct, indirect, induced and visitor related impacts, and could range from GVA to poverty indicators, potentially including: jobs created/safeguarded, gross/net new sales, quality of employment – pay levels, seasonality, and conversion of part to full-time equivalents.
2. Regeneration	Improvement of commercial activity in surrounding areas. Consideration of existing schemes such as Weymouth, Seaton, Exmouth.
3. Learning and Education	Opportunities, educational infrastructure, skills development (earth sciences, employment skills), field studies and educational tourism, university links
4. Community Cohesion and Social Capital	Improved cohesion within and between communities, improved safety, improved wellbeing and health, social inclusion and working with disadvantaged groups
5. Civic Pride	Enhanced civic pride, JCWHS community activities, Image of towns
6. Conservation and Environment	Conservation of JCWHS excluded from survey- covered by separate JCWHS monitoring activity. Potential to consider benefits to setting (wider landscape) such as AONBs, SW Coast path, protected areas, estate and countryside management
7. Partnership	Management, partnerships and working groups, international, organisational –within County Councils, DCMS etc, Cross sectoral: Public/private/third sector e.g. Fossil Festival. Provision of strategic leadership of stakeholders
8. Additional Funding	Public and private funding levered in
9. Quality of Life	Quality of Life indicators, traffic levels, cost of living
10. Cultural Activity	People involved in cultural activities, cultural infrastructure development, cultural industries, cultural product and identity

Note: the above should not be considered as exclusive, nor prescriptive.

A primary consideration at all stages when developing a model for future monitoring of the JCFP should be the following underlying tenet behind the success of the project: That the programme has a joined up nature - *the whole is greater than the sum of the parts*. This is not a 'single venue attraction'. Rather, it is **the coast** that is the major attraction, complemented by the linked network of high quality, distinct visitor facilities at different key strategic stages along the way, providing integrated, effective and sustainable visitor management, and in some cases, representing attractions in their own right.

Due to the complex nature of the study required, which reflects the wide ranging aspirations of the WHS, there is a need for this brief to remain necessarily flexible within budget, and the consultant should remain open to working with the needs of local authorities, other stakeholders and local projects within the WHS towns, as well as helping to define the geographical area to be examined.

Furthermore, it will be important to work with these stakeholders and partners from across the Site in developing indicators and models: It is crucial not to re-invent the wheel and to use locally available data and expertise as much as possible so that the work can be undertaken on an ongoing basis without the need for substantive external consultancy input on a long-term basis. In this context, key partners will include Dorset and Devon County Councils, the four district councils (Purbeck DC, Weymouth and Portland Borough Council, West Dorset DC and East Devon DC), SWRDA and South West Tourism. The model devised

must be able to address the specific outcomes and outputs of these agencies, with particular reference to the *Project Logic Chain* model as used by SWRDA (*Inputs – Activities – Outputs – Outcomes – Impacts*), the appropriate Local Area Agreements, and the targets from 'Towards 2015'. However, it is also to be expected that some additional primary evaluation research will be required, such as visitor surveys.

A benchmarking exercise comparing impact and capacity on the JCWHS in relation to similar natural and/or WH sites is planned as a complementary study to the ESCF, and the indicators chosen should potentially be transferable to this additional study. Finally, it is important that impacts take full account of the text of the World Heritage Convention, which effectively defines the UK Government's obligations to UNESCO.

4.4 Workframe

The successful consultant will design the appropriate model, source primary and secondary data and set out a framework of indicators that can be measured on an annual basis. They will define the scope of the research, attribution of impact, establish baselines and determine realistic benchmarks against which to assess progress in all elements of the project.

It is anticipated that the contract will comprise two principal stages:

Stage 1

- Inception period, clarification of brief, timescale, working relationships, stakeholders and reporting arrangements
- Desk research and analysis of key documents (including UNESCO WH Convention, JCWHS Management Plan and related strategies, existing research etc.)
- Provide a definition of the 'impact of the wide range of activities stimulated by the catalyst of World Heritage Site designation, including those deriving from the site's management plan and ensuing programme of partnership work'
- Define geographical scope of study including where benefit is seen, and give consideration to the potential leakage of beneficial impacts from the study area
- Assess primary and secondary data availability, identify gaps and define assumptions
- Identify regional trends and current drivers of change as part of the wider macro-economic context
- Establish baselines, benchmarks¹ and general indicators within a context of need for ongoing impact assessment
- Define key criteria and identify indicators (quantitative and qualitative, for tangible and intangible impacts) by which they can be measured
- Any other tasks as identified and agreed between the client and the consultant

The first stage report will need to be agreed by the JCWHS Steering Group before the second stage is actioned.

Stage 2

- Undertake an initial impact study to cover the period 2001-2007 to clarify impact to date and develop the baseline
- Develop *and test* a practical framework for the ongoing evaluation of the JCFP investment and the wider ongoing impacts of JCWHS status on Dorset, East Devon and the wider South West, according to the geographical area as defined in stage1, and ensuring that the model is suitable for use by the many partners to the JCWHS.

It is anticipated that the study will involve a range of methodologies, including desk research, data analysis, site visits and primary research (through interviews or questionnaires).

¹ With other WH Sites or protected areas if required

4.5 Outputs

Final outputs will include

- One detailed final report addressing the requirements of this brief, on paper and in digital (PDF and non-PDF) format
- An executive summary suitable for wider partner distribution
- Additional annexes containing the results of primary research in digital format
- Interim reports as requested and agreed in the inception stage
- A maximum of two presentations to the JCWHS Steering Group
- Any other outputs requested by the client on agreement with the successful applicant

5. **Contract management**

The contract will be commissioned and managed by Dr Sam Rose, Jurassic Coast Team leader, on behalf of Dorset County Council (as contracting authority) and JCWHS Team and Steering Group.

Day to day point of management and contact will be Ben Wyer, Jurassic Coast SWRDA Programme officer. Contact details are:

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6. **Tender timetable and Milestones**

- Written quotations by formal tender only, to be received no later than:
2pm on December 10th 2007
- Interview short-listed consultants: December 17th 2007
- Commencement of contract: by Jan 7th 2007

The following dates are indicative and will be subject to discussion at inception stage:

- First stage report complete March 6th 2008²
- Undertake second stage activity March 2008 – September 2008³
- Second stage report complete September 15th 2008⁴

Other key dates and milestones will be agreed at the inception meeting

7. **Budget**

The budget for this project is not to exceed £40 000 (ex VAT), and must include all incidental and travelling expenses.

8. **Tender conditions**

² In time for JCWHS Steering Group meeting on March 13th 2007

³ To allow for primary research

⁴ In time for JCWHS Steering Group September 26th 2008

The successful applicant will be required to conform to Dorset County Council Standing Orders and Financial regulations.

9. Submission and Selection Process

Award of this contract will be based on the following criteria: value for money; quality and robustness of the methodology proposed; innovation; demonstrable and relevant experience. There is no obligation to accept the lowest or any tender.

Applicants selected for short-listing will be invited to attend an interview on December 17th 2007 at County Hall, Dorchester (see contact details above for full address), where they will be asked to present their approach and answer questions. The successful applicant will be informed within one week of this interview process.

The award of the contract for this initial study does not imply any commitment by the client as to the award of future contracts. Future impact assessments will be the subject of separate contracts, either through invitations to quote or tender.

Your response will be reviewed by the Client team using the criteria described, and information to be included in the quotation is outlined below. Please provide one hard copy of your submission and a digital copy on CD.

- **Response:** your response to the brief and your proposed methodology.
- **Personnel:** you are requested to provide information on the personnel involved who would be working on the brief, with a clear statement of background, roles, the main manager/contact, number of hours involved and the rate charged per hour
- **Expertise:** a resume of relevant experience, financial and property expertise and knowledge, including examples of similar projects carried out for other clients.
- **Deadlines:** a project plan, setting out key tasks, milestones, meeting dates and reporting deadlines.
- **Financial:** you should please provide your costs for producing the specified output, including attendance at client liaison meetings, travel and associated expenses. Costs should be quoted exclusive of VAT. It is envisaged that four stage payments will be made; on commission, on completion of the first report; on receipt of the draft final report and on completion of a satisfactory final report.
- **Copyright:** the results of the research will be owned and used by all project stakeholders, including the wider populace of Dorset and East Devon in explaining what WHS designation has achieved for the area. The agreement of the Client will be required before this work can be used or quoted by the appointed consultant in other assignments.
- **Undertakings:** in responding to the quotation, you are asked to certify and give undertakings that:
 - the quotation is genuine and intended to be competitive
 - the amount of the quotation has not been fixed or adjusted, by or under or in accordance with any agreement or arrangement with any other person*
 - at any time before the time and date specified for the return of the quotation, you have not done and will not do, any of the following:
 - *inform any person* of the amount or approximate amount of the proposed quotation, except where the confidential disclosure of the approximate amount of the quotation was necessary to obtain insurance premium or other quotations necessary for tender preparation*
 - *enter into any agreement or arrangement with any other person* with the aim of preventing quotations being made or as to the amount of another quotation or the conditions on which the quotation is made*

- *offer to pay or give or agree to pay or given 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 quotation or proposed quotation for the Council any of the actions specified and described in this section*
 - *cause or induce any person to do any of these things*
- *outside the consortium if a consortium response, or outside the company*

10. Return of Submission

Should you wish to submit an application please telephone or email Ben Wyer or Sam Rose (details above) to request a Tender Envelope and a full copy of terms and conditions. Please enclose the tender in the envelope provided. Applicants should ensure they are fully conversant with the requirements of the contract before making a submission. No claims for neglect in this respect will be entertained by the Council. The County Council will not pay any costs connected with the submission.