



# Development and Regeneration Technical Services Framework 2023-2027

## Lot 2 - Place-making, masterplanning and design services

### PREAMBLE

#### Background

All of the services described in this scope of service will be commissioned in relation to one or all of the following activities in relation to a greenfield, brownfield or regeneration site:

- Acquisition of sites
- Obtaining of planning consents for sites
- Disposal of sites
- Development of sites (with Homes England sometimes acting as master developer)
- Monitoring of standards/quality post-disposal
- Investment in sites
- Advice on legacy assets
- Strategy and policy-making

The majority of the work commissioned will relate to the first four activities above, i.e. design and other consultancy work up to and including a site disposal to a third party. Post-disposal work includes monitoring third party work against agreed Client criteria. Services may be required on individual or multiple sites.

On any given project, the Client may choose to appoint others to undertake certain services in this Scope of Services. For example, the Development and Regeneration Technical Services Framework will contain a separate End-to-End Technical & Professional Services lot which includes the services shown below. Homes England also has other [existing separate frameworks](#) which may be drawn from to fulfil some of the services.

#### Purpose of this scope of service

This scope of service is set out for two reasons:

- to establish daily rates for particular types of service



- to describe at high level the services which will be required

The activities shown are therefore high-level descriptions and other development related services, not specifically listed, may also be required as part of this framework.

### **The term 'Client'**

The term 'Client' has been used throughout to cover Homes England as well as any other organisation who procures consultancy services using this Framework. As a result, no specific mention of Homes England policies, guidance, procedures, etc. is made here.

### **Further Competition (call-off tenders)**

Detailed scopes of service will be provided in more detail in a project brief when individual projects are tendered. This may involve adding to this scope, or omitting certain items (see below).

### **CDM regulations**

The application of the Construction (Design and Management) Regulations (CDM) starts from the very outset of the project e.g. RIBA stage 0 – strategic brief, conceptual and preliminary design work including master-planning. It is assumed that Lead Designer appointed to a project will also be appointed as the Principal Designer, unless a separate Principal Designer is appointed by the Client. Where the word 'design' appears in any activity below, the organisation carrying out that activity (whether the lead organisation or its sub-contractor) will be deemed to be a Designer under the CDM regulations. Where the supplier is also providing works services e.g. ground investigation works, the supplier will be appointed as Principal Contractor.

### **Building for a Healthy Life (BHL)**

The [BHL standard](#) is used by Homes England to benchmark design quality at present. Homes England is looking to expand its quality standard suite, so other quality standards may be introduced during the life of this framework.

### **Local planning authority commissions**

Local planning authorities may in the future use framework suppliers to undertake the services shown at 1.2.

### **Project website set-up**

Section 2.2.2 relates to the setting up of a project website. Please note that the setting up of the website will need to ensure compliance with all applicable laws, regulations, codes, guidance (from regulatory and advisory bodies, whether mandatory or not), international and national standards, and sanctions. It will also need to meet the internal requirements of the client with regards accessibility, intellectual property, data protection, branding, community engagement approach, acceptance testing, cyber security and security testing and website maintenance/ monitoring. Please note that the site must be hosted on servers based in the UK.

### **The following paragraphs apply to all services**

#### **Client and statutory policies**



Throughout all of the services below, consultants must adhere to all Client policies and guidance and all relevant legislation and statutory requirements, policies, guidance and/or best practice, and advise the Client of any obligations, restrictions, or areas where legislative breach and/or enforcement action may arise thereof.

## **Digital design**

The Client has an expectation that sites will be modelled and schemes designed in three dimensions from the outset of any scheme, including as a minimum all site analysis, masterplanning, landscape and engineering design. The design services must be undertaken using recognised Building Information Management (BIM) systems. The 3D model of the scheme must be capable of being inserted into a wider 3D visualisation platform, whether at an early stage to show the Client conceptual thinking, or at a later public engagement event. Collaboration with that platform should be allowed for throughout the project.

## **Digital information sharing**

Digital handover information to the Client must be in a format which they will specify when undertaking a call-off tender from this framework. The Client may request the raw digital information at any time.

## **Graphic design and printing**

The services below all include the design, printing, binding and distribution of reports and publications for the Client or for exhibitions or the media.

## **Strategic advice**

The services below all include the provision of ad hoc subject-specific strategic advice to the Client including the following activities:

- Provide policy and strategy advice and reports
- Monitor and report on existing and emerging government policy, innovation, research and practice
- Research, advise and present impacts of emerging legislation and best practice guidance
- Prepare good practice guidance and research based on the Client's projects, and help the Client in the promotion of this material
- Advise, support and provide expert witness services/representation for the Client at public examinations and planning appeals

## **Training and secondments**

Framework consultants will be requested from time to time to provide training for Homes England staff and stakeholders, and to provide secondees to Homes England on a temporary basis.



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## Scope of Service

1. Town and Country Planning Services
2. Stakeholder and Community Engagement and Social Value Services
3. Masterplanning Services including Urban Design and Architecture
4. Landscape Design and Ecology Services



## 1. Town and Country Planning Services

### 1.1 Town and Country Planning Consultancy

- 1.1.1 Lead the planning application process, including coordinating input from all consultants.
- 1.1.2 Contribute to any Technical Due Diligence reports required by the Client to assess and cost risks and opportunities prior to acquisition or other intervention, funding or support.
- 1.1.3 Advise on planning policy, strategy and approach taking into consideration national, local, and neighbourhood planning requirements.
- 1.1.4 Advise the Client and consultant team on the required site investigations and other technical information required to support all types of planning application (including inter alia outline, hybrid, reserved matters, listed building applications) and coordinate the procurement and preparation of supporting technical advice from others.
- 1.1.5 Prepare necessary reports for submission with the planning application and co-ordinate and cross-check all other planning application submission documents prepared by others. Review with the Project Manager and submit the planning application to the LPA.
- 1.1.6 Advise the Client and community engagement specialist on any relevant stakeholder activity and sensitivities which may impact any planning application for the site.
- 1.1.7 Liaise with Local Authorities including all departments involved in the planning process, and negotiate Planning Performance Agreements as necessary.
- 1.1.8 Liaise with statutory stakeholders.
- 1.1.9 Attend and represent the Client at Planning Committee as required.
- 1.1.10 Advise, support and provide expert witness services/representation for the Client at public examinations and planning appeals.
- 1.1.11 Prepare planning strategies for development projects.
- 1.1.12 Assist the Client and local authority in formulating site-specific policy such as vision documents, Local Development Frameworks or Supplementary Planning Documents (SPDs).
- 1.1.13 Advise on and negotiate Section 106 Agreements, Community Infrastructure Levy, and other tariffs.
- 1.1.14 Advise on planning conditions.
- 1.1.15 Advise on, prepare and lead planning pre-applications, and obtain sufficient detailed planning commentary prior to submitting a planning application for a site.
- 1.1.16 Advise on, coordinate and submit Environmental Impact Assessments including screening and scoping requests (or any subsequent version of this process as may be mandated by new government policy).



- 1.1.17 Advise on, coordinate and submit Health Impact Assessments
  - 1.1.18 Advise on, prepare, and submit assessments and mitigation advice for Nutrient Neutrality, Water Neutrality, and other environmental matters.
  - 1.1.19 Advise on and manage Compulsory Purchase Orders in consultation with the Client's legal and property advisors.
  - 1.1.20 Provide advice where Homes England uses its planning powers to act as a Planning Authority in consultation with the Client's legal and property advisors.
  - 1.1.21 Advise and make representations on alternative local sites being proposed by third parties in the vicinity of the Client project.
- 1.2 Local Authority advice and support**
- 1.2.1 Provide technical advice to LPAs on specific planning applications
  - 1.2.2 Undertake planning policy work within the LPA
  - 1.2.3 Undertake Development Management work within the LPA

## 2. Stakeholder and Community Engagement and Social Value Services

### 2.1 Stakeholder and Community Engagement

- 2.1.1 Undertake stakeholder research and prepare report outlining engagement strategy including inter alia local community, political, amenity society, third sector organisations, businesses. This activity should be undertaken prior to any project launch or design work i.e. at acquisition stage.
- 2.1.2 Lead all community and stakeholder engagement activities throughout the acquisition, planning and disposal process, coordinating inputs from the Client and other design team members.
- 2.1.3 Advise on and coordinate communication with the community, including advice on design, targeting, management and messaging.
- 2.1.4 Advise on and use recognised digital engagement tools and platforms to enhance community and stakeholder engagement.
- 2.1.5 Deliver stakeholder workshops aimed at understanding place-based needs and opportunities.
- 2.1.6 Design, organise and host inclusive and accessible exhibitions and events, including in face-to-face and hybrid format.
- 2.1.7 Prepare written feedback from the events and summarise for the community.



- 2.1.8 Advise the consultant team on key items to feed back into the masterplanning work and planning strategies.
- 2.1.9 Prepare Statements of Community Involvement and any other relevant materials for inclusion in planning submissions.

## **2.2 Media relations**

- 2.2.1 Undertake media relations and proactive communication work in collaboration with key project partners.
- 2.2.2 Set up a bespoke website and social media presence for a given project in close collaboration with the Client and any other key partners for the project. See preamble note for more detail.

## **2.3 Social Value**

- 2.3.1 Engage with relevant local stakeholders including (inter alia) community members, third sector organisations, education and business community to establish social value priorities for a project.
- 2.3.2 Create an appropriate local social value strategy for a project, including coordinating offers from Client and consultant team.
- 2.3.3 Prepare Social Value Statements to accompany planning applications.
- 2.3.4 Provide facilitation support to Client meetings to assist the Client in developing and refining its approach to social value.

## **3. Masterplanning Services including Urban Design and Architecture**

### **3.1 Urban Design**

- 3.1.1 Undertake any and all required site analysis including desktop assessments and reporting, including considering the issues, risks, impacts on holding and development.
- 3.1.2 Contribute to any Technical Due Diligence reports required by the Client to assess and cost risks and opportunities prior to acquisition or other intervention, funding or support.
- 3.1.3 Design masterplans for development and regeneration projects, taking into account all physical, technical, social, economic, statutory, stakeholder and environmental and financial issues and constraints.
- 3.1.4 Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to urban design in the lead up to and in support of an outline or detailed planning submission.



- 3.1.5 Collaborate with and instruct an appropriate 3D visualisation platform to insert integrated scheme drawings into a wider 3D model; produce visualisations from this platform which enable easy Client and stakeholder understanding of schemes throughout the design process.
- 3.1.6 Liaise with the sustainability consultant to achieve a masterplan design which meets the Client's and the Local Authority's sustainability targets.
- 3.1.7 Alongside the planning consultant, contribute to and support pre-application meetings with the Local Planning Authority, and respond to any Local Planning Authority queries during the preapplication or planning determination phases. Undertake any necessary post-submission discussions and undertake any necessary associated work e.g. further negotiation with statutory consultees, additional material for submission, condition drafting etc.
- 3.1.8 Contribute to and support any external Design Review Panel meetings called by the local authority or others.
- 3.1.9 Advise on and prepare parameter plans, parcel codes (for individual disposal plots) and area wide design codes.
- 3.1.10 Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required.
- 3.1.11 Review, appraise and advise on development proposals submitted to the Client by external developers, and provide ongoing guidance on development plans. Reviews may encompass BHL or other Client quality criteria. Reviews may occur at any project stage including postcompletion.

## **3.2 Architecture**

- 3.2.1 Where directed by the client, provide outline or detail designs for particular buildings in the masterplan (e.g. community buildings) or infrastructure.
- 3.2.2 Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required.
- 3.2.3 Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to architecture in the lead up to and in support of an outline or detailed planning submission.
- 3.2.4 Alongside the planning consultant, contribute to and support pre-application meetings with the Local Planning Authority, and respond to any Local Planning Authority queries during the preapplication or planning determination phases. Undertake any necessary post-submission discussions and undertake any necessary associated work e.g. further negotiation with statutory consultees, additional material for submission, condition drafting etc.
- 3.2.5 Contribute to and support any external Design Review Panel meetings called by the local authority or others.





- 3.2.6 Review, appraise and advise on development proposals submitted to the Client by external developers, and provide ongoing guidance on development plans. Reviews may encompass BHL or other Client quality criteria. Reviews may occur at any project stage including post completion.

## 4. Market Assessment Landscape Design and Ecology Services

### 4.1 Landscape Design

- 4.1.1 Undertake any and all required desktop assessments; site-based intrusive and non-intrusive investigation, surveying, monitoring, and sampling; site-based and laboratory analysis; and reporting, including considering the issues, risks, impacts on holding and development. This analysis may include consideration of soil, the present use of the site, agricultural impact, food growing impact and integration of communities with natural and agricultural systems.
- 4.1.2 Contribute to any Technical Due Diligence reports required by the Client to assess and cost risks and opportunities prior to acquisition or other intervention, funding or support.
- 4.1.3 Design all of the soft and hard landscape within a masterplan, including public realm and shared garden spaces, taking into account all physical, technical, social, economic, statutory, stakeholder and environmental and financial issues and constraints.
- 4.1.4 Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to landscape in the lead up to and in support of an outline or detailed planning submission.
- 4.1.5 Contribute towards the 3D model of the scheme to allow collaboration with a 3D visualisation platform (see preamble)
- 4.1.6 Undertake Landscape Visual Impact Assessments.
- 4.1.7 Review appropriate arboricultural surveys to identify all trees, consider their status, and enhance their potential or consider for removal and replacement.
- 4.1.8 Design sustainable urban drainage schemes in accordance with the CIRIA SuDS Manual which integrate with the underground drainage design by the civil engineer.
- 4.1.9 Advise on the appropriate use of living walls and green roofs.
- 4.1.10 Alongside the planning consultant, contribute to and support pre-application meetings with the Local Planning Authority, and respond to any Local Planning Authority queries during the preapplication or planning determination phases. Undertake any necessary post-submission discussions and undertake any necessary associated work e.g. further negotiation with statutory consultees, additional material for submission, condition drafting etc.



- 4.1.11 Prepare strategies and associated cost plans for the long term management of open spaces, including publicly accessible spaces and ecological assets.
- 4.1.12 Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 4.1.13 Contribute to plot, site and area wide design codes being prepared by the urban designer
- 4.1.14 Participate in community engagement activities including preparation of exhibition material in both physical and online format
- 4.1.15 Review, appraise and advise on landscape proposals and specifications submitted to the Client by external developers, and provide ongoing guidance on development plans. Reviews may encompass BHL or other Client quality criteria. Reviews may occur at any project stage including post-completion.

## **4.2 Ecology Advice**

- 4.2.1 Advise the Client on appropriate on and off-site Biodiversity Net Gain (BNG) including targets, costings and relevant authority liaison.
- 4.2.2 Devise and monitor a BNG strategy for a project, including at feasibility and design stages.
- 4.2.3 Advise on the upcoming Environmental Net Gain (ENG) regime and use ENG as the reporting structure as and when it supersedes BNG.
- 4.2.4 Advise on impacts and likely implications relating to nutrient neutrality and water neutrality.
- 4.2.5 Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required.
- 4.2.6 Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to ecology in the lead up to and in support of an outline or detailed planning submission.
- 4.2.7 Alongside the planning consultant, contribute to and support pre-application meetings with the Local Planning Authority, and respond to any Local Planning Authority queries during the preapplication or planning determination phases. Undertake any necessary post-submission discussions and undertake any necessary associated work e.g. further negotiation with statutory consultees, additional material for submission, condition drafting etc.

## **4.3 Landscape and Ecology-Related Surveys**

- 4.3.1 Advise on, write a brief for and undertake the following surveys:
  - a. Arboricultural
  - b. Protected and/or notable species and habitats
  - c. Invasive Non-Native Species (e.g. Japanese Knotweed, Himalayan Balsam, Giant Hogweed, etc.) as well as any notifiable weeds or other identified invasive species.



- 4.3.2 Obtain all necessary licences and consents (including geographically-specific) in relation to species and habitats in order to facilitate works on site, including to assist other investigations, surveys, and for construction activities.
- 4.3.3 Having reviewed survey outcomes, advise on and create a strategy for appropriate remedial and/or management provisions, including if emergency works are required.



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