



# Development and Regeneration Technical Services Framework 2023-2027

## Lot 1 - End-to-end technical and professional 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 Place-Making, Masterplanning & Design lot which includes the services shown highlighted in 7, 8, 9 and 10 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).

## **Non-mandatory services**

Only suppliers who are appointed to the Framework as Non-Mandatory Services Suppliers will be allowed to provide these services under Lot 1.

## **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.

## **Development monitoring**

Consultants must have the capability to undertake the scope of services for this role as described by the Royal Institution of Chartered Surveyors in the RICS professional guidance note, UK - Lender's independent monitoring surveyor 1st edition (the "RICS Guidance") and RICS Project Monitor Services.

## **Local planning authority commissions**

Local planning authorities may in the future use framework suppliers to undertake the services shown at 7.2.

## **Project website set-up**

Section 8.2.2 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.



## Scope of Service

### MANDATORY SERVICES

1. Project and Cost Management Services
2. Development Monitoring Services
3. Risk Management and Monitoring Services
4. Property Advice Services
5. Contract Advice and Procurement Services
6. Construction, Design, and Management and Health & Safety Services
7. Town and Country Planning Services
8. Stakeholder and Community Engagement and Social Value Services
9. Masterplanning Services including Urban Design and Architecture
10. Landscape Design and Ecology Services
11. Environment and Sustainability Services
12. Structural and Civil Engineering Services
13. Transport and Traffic Services
14. Mechanical and Electrical Services
15. Fire Engineering Services
16. Heritage and Townscape Services

### NON-MANDATORY SERVICES

17. Asbestos Services

## 1. Project Management and Cost Management Services

### 1.1. *Project Management Services*

- 1.1.1. Provide a single point of contact to report to the Client.
- 1.1.2. Manage the work plan and outputs of all consultants, whether in the lead organisation, sub-consultants or consultants appointed directly by the Client where instructed.



- 1.1.3. Liaise and work closely with any and all Client appointed advisors, lawyers, barristers and project teams.
- 1.1.4. Prepare, monitor and manage a project programme.
- 1.1.5. Advise on programmes for development, refurbishment and construction projects prepared by others.
- 1.1.6. Define, alongside other key consultants, project objectives and outcomes with the Client and stakeholders.
- 1.1.7. Work with the Client to establish the governance, management and decision-making structure for projects.
- 1.1.8. Arrange appropriate project team meetings, the reporting structure for the project, and chair/minute those meetings.
- 1.1.9. Manage, advise on, contribute to, and participate in any tender process required in the course of the project.
- 1.1.10. Provide a contract administration and contract management role at all stages of a project.
- 1.1.11. Capture data on MMC completions (as defined by Department for Levelling Up, Housing and Communities (DLUHC)) as required by the Client.
- 1.2. *Cost Management Services***
  - 1.2.1. Provide project cost estimates, cost plans, cost advice and cost management reports
  - 1.2.2. Provide costed options for development projects and programmes.
  - 1.2.3. Undertake regular monitoring and budgetary control of projects, programmes, and individual contracts.
  - 1.2.4. Research and report on financial and other data drawn from market sources on a national, regional and local basis.
  - 1.2.5. Prepare and assess all financial aspects of development appraisals, including effects of capital and revenue expenditure, project cost calculations and cash-flow projections.
  - 1.2.6. 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.
  - 1.2.7. Prepare detailed financial cash flow reviews including sensitivity analysis
  - 1.2.8. Review and report on development appraisals, abnormals, and other costs prepared by others and advise or challenge as appropriate.
  - 1.2.9. Prepare life-cycle cost studies.
  - 1.2.10. Advise on availability of and grant or other funding.
  - 1.2.11. Advise on project insurances, warranties, and bonds.
  - 1.2.12. Provide support and advice to a borrower to pre-empt/deal with specific issues and challenges during a project.



- 1.2.13. Provide options analysis and recommendations to Homes England or a borrower on how a project should continue.
- 1.2.14. Provide robust financial estimates for the advice being provided to allow for financial bid, accurate tendering, and cost management
- 1.2.15. During construction phase, agree progress against payment plan and issue certificates for payment to the Contractor and copied to Client, in accordance with the contract.
- 1.2.16. Manage the resolution of any issues arising during the defects liability period and sign-off of the release of the final retention.

## 2. Development Management and Monitoring Services

### 2.1. *Development Management and Monitoring*

- 2.1.1. Provide audit reports in compliance with RICS guidance and monthly progress reports to cover:
  - a. Cost Analysis – Plan, Month – Year to date – Remaining
  - b. Contingency use
  - c. Cost to Complete and Adequacy of Funds
  - d. HBF Milestones – including recycled sales
  - e. Planning Conditions tracker
  - f. Insurances
  - g. Contracts
  - h. Collateral Warranties
  - i. Building Regulations Approval / Warranty Provider
  - j. Health & Safety & CDM Regulations
  - k. Section Agreements S104/185/278 etc.
  - l. Build warranty completion certificates
  - m. Outstanding actions – issues of concern with timescale to resolve
- 2.1.2. Provide support on procurement, due diligence, contracting and monitoring of projects.
- 2.1.3. Identify property related, financial and commercial risks and recommend approaches to their management.
- 2.1.4. Capture data on Modern Methods of Construction (MMC) completions (as defined by DLUHC) as required by the Client.



### 3. Risk Management and Monitoring Services

#### 3.1. Risk Management and Monitoring

- 3.1.1. Undertake risk framework and policy development
- 3.1.2. Advise on reporting of risk and governance, including collation and management of Risk Registers
- 3.1.3. Undertake risk modelling, assessment, analysis and validation
- 3.1.4. Identify corporate, property related, financial, commercial, construction and technical risks and recommend approaches to their management.

### 4. Property Advisory Services

#### 4.1. Property Advice

- 4.1.1. Provide Property Advisory services in compliance with current RICS best practice.
- 4.1.2. Review national, regional and local markets to identify appropriate strategies for adding value to, developing, acquiring or disposing of land to the benefit of public sector Client projects or programmes.
- 4.1.3. Undertake market research and provide marketing advice generally or relating to a specific area.
- 4.1.4. Advise the Client on property matters to enable the Client to determine the appropriate extent of its delivery activity on particular sites e.g. enabling works or master development, and to inform the disposal strategy.
- 4.1.5. 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.
- 4.1.6. Provide property-related advice, in consultation with the client and Local Planning Authority (LPA), to include:
  - a. drafting and submission of reports to support planning applications
  - b. assessment of conditions and S106
- 4.1.7. Review any development strategies or programmes to achieve best alignment with the Client's objectives and financial targets.
- 4.1.8. Provide advice on Collaboration Agreements with other landowners.
- 4.1.9. Assist the Client in preparing evidence and reports necessary for achieving approvals for projects, to include approvals from DLUHC, Treasury.



- 4.1.10. Assist in the preparation of draft development briefs in respect of individual sites / joint venture opportunities.

## 5. Contract Management and Monitoring and Procurement Services

### 5.1. *Contract Management and Monitoring and Procurement*

- 5.1.1. Maintain a full working knowledge of public competition, tendering and financial rules in order to advise Clients appropriately.
- 5.1.2. Provide advice on contractual or other legal matters, including execution, contract services, dispute resolution, and defence of claims, litigation, and adjudication, and, where relevant, complete legal documentation in consultation with the Client's legal advisors.
- 5.1.3. Advise on appropriate forms of construction contract and tailor these appropriately to the project, including additional clauses, Z- and X-Clauses as appropriate in consultation with the Client's legal advisors.
- 5.1.4. Undertake full contractual management and supervision duties, including maintaining progress, issuing, assessing and responding to Early Warning Notices, Project Managers Instructions, Compensation Events, managing defects resolution during the defect period, maintaining and monitoring risk registers, and ensuring compliance with the contract.
- 5.1.5. Prepare all tender documents and works specifications. Manage tender process including site visits by bidders, assessment and shortlisting of bidders and recommendation of proposed winning bidder for agreement by the Client.
- 5.1.6. Prepare standstill letters with appropriate detailed feedback for agreement by the Client.
- 5.1.7. Manage construction appointments, including programme, cost management and financial control, delivery and quality, and produce regular progress reports and project performance dashboards

## 6. Construction, Design & Management and Health & Safety Services

### 6.1. *Principal Designer Services*

- 6.1.1. Where appointed as Lead Designer to a project, undertake the role of Principal Designer and comply with the Principal Designer duties as set out in the Construction (Design and Management) Regulations 2015 specifically regulations 4(4), 8,9,10, 11, 11(7) and 12.

### 6.2. *Construction, Design & Management (CDM) Advisor Support Services*

- 6.2.1. Act as the single point of contact for H&S advice throughout the project.
- 6.2.2. Advise on written agreements between joint clients so CDM duties are clear.





- 6.2.3. 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.
- 6.2.4. Advise and assist in the development of the Client Brief and establishing the project team, including suitability assessments / competency checks of duty holders appointed or being considered for appointment.
- 6.2.5. Advise on the suitability of arrangements (including welfare facilities for health and safety to be managed effectively throughout all stages of the project, including periodic reviews of management arrangements.
- 6.2.6. Assist in the drafting and issue of appointment letters, specifically Principal Contractors and Principal Designers.
- 6.2.7. Advise on the adequacy of pre-construction information, including any information gaps, and share the pre-construction information with other duty holders appointed or being considered for appointment.
- 6.2.8. Submit the F10 notification to the HSE (where required)
- 6.2.9. Advise on the suitability of construction phase plans (CPP) prior to the commencement of construction work.
- 6.2.10. Check that the principal designer and principal contractor appointed to the project are complying with their duties under CDM.
- 6.2.11. Advise on the suitability of risk assessments and method statements (RAMS) provided by contractors in advance of works.
- 6.2.12. Carry out routine site safety inspections of the principal contractor and contractors during construction phase.
- 6.2.13. Check that the Principal Designer has prepared and /or is developing a health and safety file for the project.

### **6.3. Health & Safety Services**

- 6.3.1. Provide a wide range of generalist, construction and property related health and safety support services including but not limited to risk assessments, fire risk assessment, audits, inspections, H&S training, contractor competency assessments and monitoring, and accident investigation.

## **7. Town and Country Planning Services**

### **7.1. Town and Country Planning Consultancy**

- 7.1.1. Lead the planning application process, including coordinating input from all consultants.
- 7.1.2. 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.
- 7.1.3. Advise on planning policy, strategy and approach taking into consideration national, local, and neighbourhood planning requirements.



- 7.1.4. 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.
- 7.1.5. 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.
- 7.1.6. Advise the Client and community engagement specialist on any relevant stakeholder activity and sensitivities which may impact any planning application for the site.
- 7.1.7. Liaise with Local Authorities including all departments involved in the planning process, and negotiate Planning Performance Agreements as necessary.
- 7.1.8. Liaise with statutory stakeholders.
- 7.1.9. Attend and represent the Client at Planning Committee as required.
- 7.1.10. Advise, support and provide expert witness services/representation for the Client at public examinations and planning appeals.
- 7.1.11. Prepare planning strategies for development projects.
- 7.1.12. Assist the Client and local authority in formulating site-specific policy such as vision documents, Local Development Frameworks or Supplementary Planning Documents (SPDs).
- 7.1.13. Advise on and negotiate Section 106 Agreements, Community Infrastructure Levy, and other tariffs.
- 7.1.14. Advise on planning conditions.
- 7.1.15. Advise on, prepare and lead planning pre-applications, and obtain sufficient detailed planning commentary prior to submitting a planning application for a site.
- 7.1.16. 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).
- 7.1.17. Advise on, coordinate and submit Health Impact Assessments
- 7.1.18. Advise on, prepare, and submit assessments and mitigation advice for Nutrient Neutrality, Water Neutrality, and other environmental matters.
- 7.1.19. Advise on and manage Compulsory Purchase Orders in consultation with the Client's legal and property advisors.
- 7.1.20. 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.
- 7.1.21. Advise and make representations on alternative local sites being proposed by third parties in the vicinity of the Client project.

## **7.2. Local Authority advice and support**



- 7.2.1. Provide technical advice to LPAs on specific planning applications
- 7.2.2. Undertake planning policy work within the LPA
- 7.2.3. Undertake Development Management work within the LPA

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

### 8.1. Stakeholder and Community Engagement

- 8.1.1. 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.
- 8.1.2. Lead all community and stakeholder engagement activities throughout the acquisition, planning and disposal process, coordinating inputs from the Client and other design team members.
- 8.1.3. Advise on and coordinate communication with the community, including advice on design, targeting, management and messaging.
- 8.1.4. Advise on and use recognised digital engagement tools and platforms to enhance community and stakeholder engagement.
- 8.1.5. Deliver stakeholder workshops aimed at understanding place-based needs and opportunities.
- 8.1.6. Design, organise and host inclusive and accessible exhibitions and events, including in face-to-face and hybrid format.
- 8.1.7. Prepare written feedback from the events and summarise for the community.
- 8.1.8. Advise the consultant team on key items to feed back into the masterplanning work and planning strategies.
- 8.1.9. Prepare Statements of Community Involvement and any other relevant materials for inclusion in planning submissions.

### 8.2. Media relations

- 8.2.1. Undertake media relations and proactive communication work in collaboration with key project partners.
- 8.2.2. 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.

### 8.3. Social Value

- 8.3.1. 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.
- 8.3.2. Create an appropriate local social value strategy for a project, including coordinating offers from Client and consultant team.



- 8.3.3. Prepare Social Value Statements to accompany planning applications.
- 8.3.4. Provide facilitation support to Client meetings to assist the Client in developing and refining its approach to social value.

## 9. Masterplanning including Urban Design and Architecture Services

### 9.1. *Urban Design*

- 9.1.1. Undertake any and all required site analysis including desktop assessments and reporting, including considering the issues, risks, impacts on holding and development.
- 9.1.2. 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.
- 9.1.3. Design masterplans for development and regeneration projects, taking into account all physical, technical, social, economic, statutory, stakeholder and environmental and financial issues and constraints.
- 9.1.4. 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.
- 9.1.5. 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.
- 9.1.6. Liaise with the sustainability consultant to achieve a masterplan design which meets the Client's and the Local Authority's sustainability targets.
- 9.1.7. 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 pre-application 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.
- 9.1.8. Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 9.1.9. Advise on and prepare parameter plans, parcel codes (for individual disposal plots) and area wide design codes.
- 9.1.10. Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required.
- 9.1.11. 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 post-completion.



## **9.2. Architecture**

- 9.2.1. Where directed by the client, provide outline or detail designs for particular buildings in the masterplan (e.g. community buildings) or infrastructure.
- 9.2.2. Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required.
- 9.2.3. 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.
- 9.2.4. 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 pre-application 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.
- 9.2.5. Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 9.2.6. 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.

## **10. Landscape Design and Ecology**

### **10.1. Landscape Design**

- 10.1.1. 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.
- 10.1.2. 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.
- 10.1.3. 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.
- 10.1.4. 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.
- 10.1.5. Contribute towards the 3D model of the scheme to allow collaboration with a 3D visualisation platform (see preamble)



- 10.1.6. Undertake Landscape Visual Impact Assessments.
- 10.1.7. Review appropriate arboricultural surveys to identify all trees, consider their status, and enhance their potential or consider for removal and replacement.
- 10.1.8. Design sustainable urban drainage schemes in accordance with the CIRIA SuDS Manual which integrate with the underground drainage design by the civil engineer.
- 10.1.9. Advise on the appropriate use of living walls and green roofs.
- 10.1.10. 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 pre-application 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.
- 10.1.11. Prepare strategies and associated cost plans for the long term management of open spaces, including publicly accessible spaces and ecological assets.
- 10.1.12. Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 10.1.13. Contribute to plot, site and area wide design codes being prepared by the urban designer
- 10.1.14. Participate in community engagement activities including preparation of exhibition material in both physical and online format
- 10.1.15. 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.
- 10.2. Ecology Advice**
- 10.2.1. Advise the Client on appropriate on and off-site Biodiversity Net Gain (BNG) including targets, costings and relevant authority liaison.
- 10.2.2. Devise and monitor a BNG strategy for a project, including at feasibility and design stages.
- 10.2.3. Advise on the upcoming Environmental Net Gain (ENG) regime and use ENG as the reporting structure as and when it supersedes BNG.
- 10.2.4. Advise on impacts and likely implications relating to nutrient neutrality and water neutrality.
- 10.2.5. Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required.
- 10.2.6. 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.
- 10.2.7. 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 pre-



application 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.

**10.3. Landscape and Ecology-Related Surveys**

10.3.1. 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.

10.3.2. 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.

10.3.3. Having reviewed survey outcomes, advise on and create a strategy for appropriate remedial and/or management provisions, including if emergency works are required.

**11. Environment and Sustainability Services**

**11.1. Environment**

11.1.1. Contribute to the Technical Due Diligence report required by the Client to assess and cost risks and opportunities prior to acquisition

11.1.2. Provide surveys, investigations, advice, assessments, strategies and reports on all environmental aspects (such as air, land, water, ecology, resources, materials, waste, transport, buildings etc.) associated with land and building development.

11.1.3. Advise the consultant team on key items to feed back into the masterplanning work and planning strategies.

11.1.4. Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to environmental issues in the lead up to and in support of an outline or detailed planning submission.

11.1.5. 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 pre-application 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.

11.1.6. Prepare all necessary drawn and written environmental information, including preparation and submission of any ecological or other environmental permits or licenses needed to support any enabling or infrastructure works, and provide monitoring services to ensure these are fulfilled.

**11.2. Sustainability**



- 11.2.1 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.
- 11.2.2 Advise on key corporate and project sustainability strategy and targets, relative to current and future standards and influences.
- 11.2.3 Advise on achieving the Client's and Local Authority's corporate or planning-related sustainability targets for a given project
- 11.2.4 Create a strategy and action plan for achieving sustainability goals for a given project and monitor design compliance against targets; including for example Energy Strategies and Action Plans.
- 11.2.5 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 pre-application 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.
- 11.2.6 Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 11.2.7 Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required
- 11.2.8 Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to sustainability in the lead up to and in support of an outline or detailed planning submission.
- 11.2.9 Review sustainability proposals from others and advise the Client as to compliance with the client's sustainability targets

## 12. Structural and Civil Engineering Services

### 12.1. Structural and Civil Engineering Design

- 12.1.1 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.
- 12.1.2 Advise on ground-related matters, including:
  - a. historical and geo-environmental setting to ascertain if any land contamination may be present on or off the site.
  - b. presence of Unexploded Ordnance (UXO) and radioactivity or other hazards
  - c. geo-environmental conditions which may impact drainage, SUDs and ecology or future development
  - d. geotechnical and mining issues that may influence the geotechnical stability and future land use





- e. foundation and drainage solutions
- 12.1.3. Provide coordinated structural and civil engineering design to facilitate regeneration and development of land to RIBA stage 4, and secure all necessary technical approvals. This would include, but not limited to, earthworks and ground improvement, drainage, highways, bridge structures, other structures, utilities and services.
- 12.1.4. Contribute towards the 3D model of the scheme to allow collaboration with a 3D visualisation platform (see preamble).
- 12.1.5. Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required
- 12.1.6. Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to structural and civil engineering in the lead up to and in support of an outline or detailed planning submission.
- 12.1.7. 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 pre-application 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.
- 12.1.8. Advise on Modern Methods of Construction, including:
  - a. implications to other enabling/mitigation works, suppliers, financial and innovation risk;
  - b. appropriate warranties, mortgageability, and insurances
  - c. appropriate quality assurance accreditations (e.g. BOPAS, NHBC etc.)
- 12.1.9. Advise on all demolition and decommissioning requirements to remove above and below ground structures.
- 12.1.10. Identify of all relevant notices/approvals required to undertake demolition works (such as aS80 Notice) and preparation of these notices along with any associated documents as required.
- 12.1.11. Advise on existing building or structure retention including heritage assets and including structural stability, and advise on any remediation works required
- 12.1.12. Review and advise on any licencing arrangements that may be in place, such as Environment Agency bylaws, land drainage consents, Internal Drainage Boards, Crown Commissioners, Port of London, Riparian rights and duties, etc. and liaison with all relevant stakeholders.
- 12.1.13. Review the flood risk and depth for the site and its immediate surroundings from all sources, including breach analysis, with risk assessment.
- 12.1.14. Identify underground pipework runs and above ground foul and storm water pipework
- 12.1.15. Undertake reviews of drainage capacity and demand, and advise on and design likely point of connection and service runs (including depths and levels) of foul and storm water as well as upgrading and reinforcement requirements



- 12.1.16. Liaise with Lead Local Flood Authority and Environment Agency.
- 12.1.17. Advise on and design diversions required for underground pipes and above ground foul and storm water infrastructure
- 12.1.18. Review options for abandonment and/or alteration/modification of any private foul and storm water that will be required, including
  - a. upgrade requirements of any site base infrastructure for adoption
  - b. requirements for gravity discharge options or pumping stations
  - c. phased delivery of any required wider infrastructure options
- 12.1.19. Design appropriate drainage strategies, Sustainable Drainage Systems (SuDS) and flood mitigation infrastructure, considering relevant site conditions (e.g. topography, permeability, and potential contamination) and likely future discharge rate from Lead Local Flood Authority.
- 12.1.20. Advise on the use of and design rainwater harvesting systems.
- 12.1.21. Advise on 'ransom strips' present that may impact any of the above
- 12.1.22. Provide coordinated structural and civil engineering design to facilitate regeneration and development of land to RIBA stage 4, and secure all necessary technical approvals. This would include, but not limited to, earthworks and ground improvement, drainage, highways, bridge structures, other structures, utilities and services.
- 12.2. *Structural and Civil Engineering-Related Surveys***
- 12.2.1. 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.
- 12.2.2. Provide the direct procurement and supply of all required sub-consultants, contractors, and equipment to undertake the above, including all intrusive investigation and analysis.
- 12.2.3. Consider, design, and agree with appropriate stakeholders all required mitigation, including securing all Licenses, Permits, and/or other requirements to undertake the mitigation and, if relevant, secure successful adoption and/or transfer of mitigation to relevant party.
- 12.2.4. Advise on, write a brief for and undertake the following surveys:
  - a. topographical (including aerial)
  - b. geotechnical
  - c. hazardous materials and radiological contaminants
  - d. CCTV for drainage
- 12.2.5. Having reviewed survey outcomes, advise on and create a strategy for appropriate remedial and/or management provisions, including if emergency works are required.



- 12.2.6. Provide a wide range of general structural and civil engineering, construction, property and structures related support services including but not limited to risk assessments, site, building and structures audits, inspections and monitoring.

### 13. Transport and Traffic Services

#### 13.1. *Transport and Traffic*

- 13.1.1. Provide analysis of current vehicular and pedestrian access (formal and informal, including trespass) and capacity, including the provision of Transport Assessments, Travel Plans, Parking Assessments, etc.
- 13.1.2. 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.
- 13.1.3. Advise on sustainable transport and active travel strategies including walking, cycling, e-bikes/scooters, sustainable travel plans and all other innovative travel solutions.
- 13.1.4. Design future access arrangements and solutions for the site and demand with likely capacity upgrades and alterations required.
- 13.1.5. Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to transport and traffic engineering in the lead up to and in support of an outline or detailed planning submission.
- 13.1.6. 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 pre-application 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.
- 13.1.7. Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 13.1.8. Participate in community engagement activities including preparation of exhibition material in both physical and online format
- 13.1.9. Design highways, bridges and other transport infrastructure as required by the masterplan
- 13.1.10. Contribute towards the 3D model of the scheme to allow collaboration with a 3D visualisation platform (see preamble).
- 13.1.11. Advise on phased delivery of any required wider infrastructure options.
- 13.1.12. Advise on upgrade requirements of any site-based infrastructure for adoption.
- 13.1.13. Advise on 'ransom strips' present that may impact any of the above.
- 13.1.14. Advise on aviation, rail, coastal/maritime and inland waterways safety and standards, including wayleaves and offsets, infrastructure provision, and reporting, and duties as owner.



## 14. Mechanical and Electrical Services

### 14.1. Mechanical and Electrical Design

- 14.1.1. 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.
- 14.1.2. Determine existing capacity and demand for all services in the light of Client requirements on a site
- 14.1.3. Design likely point of connection and service runs (including depths and levels) for electricity, gas, telecommunications (telephone, cable and fibre-optics) as well as likely upgrading and reinforcement requirements, their likely location, and phased delivery of any required wider service infrastructure options, e.g. heat networks and other low and zero carbon energy solutions.
- 14.1.4. Contribute towards the 3D model of the scheme to allow collaboration with a 3D visualisation platform (see preamble).
- 14.1.5. Advise on any disconnections and diversions required of underground and above ground plant of electricity, gas, potable water, telecommunications (telephone, cable and fibre-optics) and pipelines
- 14.1.6. Review the need for the abandonment and/or alteration/modification of any private services/utilities that will be required, including upgrade requirements of any site-based infrastructure for adoption.
- 14.1.7. Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to mechanical and electrical engineering in the lead up to and in support of an outline or detailed planning submission.
- 14.1.8. 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 pre-application 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.
- 14.1.9. Review the need for contaminant resistant potable water supply pipes
- 14.1.10. Advise on opportunities to include a site-wide supply option with an inset appointment, and if agreed scope service and manage procurement.
- 14.1.11. Advise on utility suppliers localised requirements
- 14.1.12. Review and advise on any ransoms or title issues that may impact on any of the above
- 14.1.13. Manage others in carrying out services diversion works to monitor compliance with the agreed diversion works design.

### 14.2. Mechanical and Electrical-Related Surveys



- 14.2.1. 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.
- 14.2.2. Advise on, write a brief for and undertake the following surveys as directed by the client:
  - a. PAS128 tracing and detection for the location of all underground and above ground cables/pipes for electricity, gas, potable water, sewerage, telecommunications (telephone, cable and fibre-optics) and pipelines and other services and utilities as required
  - b. Acoustic and vibration
  - c. Air quality
- 14.2.3. Having reviewed survey outcomes, advise on and create a strategy for appropriate remedial and/or management provisions, including if emergency works are required.

## 15. Fire Engineering Services

### 15.1. Fire Engineering

- 15.1.1. Provide advice regarding all the aspects of fire safety of the building design, including:
  - a. Determining the project's fire safety design objectives and collaborating with the design team to ensure the identified objectives are included in the design.
  - b. Documenting the fire safety design in a fire strategy report.
  - c. Producing or assisting the design team to produce relevant fire engineering drawings.
  - d. Seeking approvals from relevant third parties.
  - e. Reviewing design documentation from the design team to check alignment with the fire safety design objectives.
  - f. Updating the fire strategy report as necessary during the construction stage.
  - g. Producing necessary documentation for the purposes of handover to tenants, to help them learn their responsibilities and the building's fire safety design.
  - h. Identifying all detailed fire engineering analyses required in the design stage.
  - i. Identifying the required fire safety systems, their specification requirements and the unique aspects of these systems that suit the said building.
  - j. Identifying the fire compartmentation requirements to ensure they are detailed in the appropriate fire compartmentation drawing.



## 16. Heritage and Townscape Services

### 16.1. Heritage and Townscape

- 16.1.1. 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.
- 16.1.2. Advise on all designations as Heritage Assets (e.g. World Heritage Sites, Scheduled Monuments, Listed Buildings, Protected Wreck Sites, Registered Park and Gardens, Registered Battlefields, etc.)
- 16.1.3. Advise structural engineer and architect on strategies for retention and management of heritage assets.
- 16.1.4. Advise planning consultant on any applications involving listed buildings or structures to be retained.
- 16.1.5. Advise on, scope out and manage any required heritage or archaeological surveys e.g. geophysical surveys, trial trenches. Advise the client on the findings of additional surveys, impacts on the proposals and mitigation strategies.
- 16.1.6. Advise on Conservation Areas and "non-designated" heritage assets (including locally listed important buildings or sites, e.g. monuments, statues, historical earth works, cemeteries, etc.).
- 16.1.7. Review emerging outline proposals with respect to townscape issues, and make recommendations to the design team on optimising scheme design to suit.
- 16.1.8. Prepare all necessary drawn and written information, including all necessary reports required by the LPA, relating to heritage and townscape in the lead up to and in support of an outline or detailed planning submission.
- 16.1.9. 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 pre-application 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.
- 16.1.10. Contribute to and support any external Design Review Panel meetings called by the local authority or others
- 16.1.11. Participate in community engagement activities including preparation of exhibition material in both physical and online format, as required



**NON-MANDATORY SERVICES (these may only be provided by a Non-Mandatory Service Supplier – please see Framework Handbook)**

**17. Asbestos Services**

**17.1. Asbestos Services**

- 17.1.1. 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.
- 17.1.2. 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.
- 17.1.3. Provide the direct procurement and supply of all required sub-consultants, contractors, and equipment to undertake the above, including all intrusive investigation and analysis.
- 17.1.4. Consider, design, and agree with appropriate stakeholder all required mitigation, including securing all Licenses, Permits, and/or other requirements to undertake the mitigation and, if relevant, secure successful adoption and/or transfer of mitigation to relevant party.
- 17.1.5. Provide general advice regarding asbestos e.g.
  - a. Maintenance and management
  - b. Mitigation and removal including strategies and methodologies
  - c. Removal procurement, specification, and contract advice
  - d. Air monitoring and clearance testing
- 17.1.6. Undertake project management of removal and treatment projects including advising Homes England on the selection of asbestos removal contractors, related cost advice and monitoring.
- 17.1.7. Undertake confirmatory management and supervision of asbestos removal contractors during planning of works and on site.

**17.2. Asbestos Surveys**

- 17.2.1. Undertake asbestos management surveys, re-inspection surveys and production of Asbestos Management Plans
- 17.2.2. Undertake the following survey types:
  - a. Material & Priority Assessment scoring of Management Surveys
  - b. Refurbishment and demolition surveys
  - c. Surveys for construction projects
  - d. Sample analysis



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Making homes happen

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