

Project Brief: Preparation of a Design Guide Supplementary Planning Document (SPD) for Maldon District

1.0 Introduction

- 1.1 Maldon District has a built environment with a distinctive character that is closely related to its local environment and history. National planning policy places great importance on the design of the built environment and states that high quality design should ensure that new development is visually attractive, responsive to local character, helps to promote healthy communities, and creates buildings which are durable, adaptable, and function well within the surrounding area to create a safe and accessible environment. Good design should enable and encourage people to live healthy lifestyles, reduce the risk of crime, create accessible environments which are inclusive for all sectors of society, and increase opportunities for social interaction.
- 1.2 A significant amount of development is expected to take place in Maldon district over the next 15 years and if the character and quality of our towns and villages is to be maintained and enhanced it is vital that new development is designed to a high standard. The District Council has therefore put good quality design at the centre of its drive towards sustainable development and wants to promote and deliver high quality design throughout the district and to inspire developers and designers to do the same.
- 1.3 Significant improvements in the quality of new development can be achieved if proposals are informed by a proper understanding of both key design principles and the character of the area in which they are situated. The Council is therefore seeking to appoint suitably qualified consultants with relevant experience to prepare a Design Guide SPD for Maldon District. The Design Guide, together with the design policies in the Local Development Framework (LDP) will be the key mechanism for delivering high quality design in the district.
- 1.4 The LDP sets out the planning strategy for future growth over the next 15 years which is based on an understanding of the unique and distinguishing features of the district. In accommodating growth requirements, the Council will seek to ensure that development will not have a detrimental impact on its surrounding area and local context and will actively seek opportunities for enhancement in the built environment. Policy D1 provides the policy basis within which the Design Guide SPD is to be prepared and states that all development must:
 - 1) Respect and enhance the character and local context and make a positive contribution in terms of:-
 - a) Architectural style, use of materials, detailed design features and construction methods. Innovative design and construction solutions will be considered where appropriate;
 - b) Height, size, scale, form, massing and proportion;
 - c) Landscape setting, townscape setting and skylines;
 - d) Layout, orientation, and density;
 - e) Historic environment particularly in relation to designated and non-designated heritage assets;

- f) Natural environment particularly in relation to designated and non-designated sites of biodiversity / geo-diversity value; and
 - g) Energy and resource efficiency.
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- 2) Provide sufficient and usable private and public amenity spaces, green infrastructure and public open spaces;
 - 3) Contribute positively towards the public realm and public spaces around the development;
 - 4) Protect the amenity of surrounding areas taking into account privacy, overlooking, outlook, noise, smell, light, visual impact, pollution, daylight and sunlight;
 - 5) Include safe and secure vehicle and cycle parking in accordance with the Council's adopted parking standards;
 - 6) Maximise connectivity within the development and to the surrounding areas including the provision of high quality and safe pedestrian and cycle routes;
 - 7) Maximise opportunities for sport and physical activity;
 - 8) Contribute to and enhance local distinctiveness;
 - 9) Incorporate design measures to reduce social exclusion, the risk of crime, and the fear of crime; and
 - 10) Encourage inclusive design and effective use of internal and external space.
- 1.5 The natural, historic and built environment of the District is distinctive in character and diverse in its location across towns and villages in rural, coastal, and estuarine environments. However, there are concerns that the unique character of some parts of the District is gradually being eroded by insufficient and inconsistent design principles. When located close to, or in the setting of a heritage asset, new development should respect the importance, character and local context of that asset. Good design should seek to positively respond to the important features of the asset, and enhance its overall setting and function.
- 1.6 The Council expects all development to support the principles of inclusive design, to ensure that new development can be used by all people, and to seek to deliver green infrastructure benefits where appropriate. Design should also seek to reduce social exclusion within the District, and seek to improve people's access to housing, employment, and required services and facilities. The design of new development should also maximise people's ability to access required services and facilities by sustainable methods of transport, particularly through the provision of high quality pedestrian and cycle routes.
- 1.7 In order to promote the objectives set out in Policy D1 and to ensure that development is of a high design quality which will enhance the natural, historic and built environment of the district, the Council is seeking to appoint suitably qualified consultants with relevant experience to prepare a new Design Guide for Maldon District. The new Design Guide, together with the design policies in the Local Development Framework will be the key mechanism for delivering high quality design in the district.

2.0 Aims

2.1 The Council is seeking to deliver an innovative and bespoke Design Guide to help developers, applicants and Council officers to improve the quality of design in new development across the district. Recognised principles of good design should be sought to create a high quality built environment for all types of development, irrespective of location within the District. Although visual appearance and the architecture of individual buildings are important factors, good design should improve connections between people and places, and should integrate new development into the natural, built and historic environment.

2.2 The SPD will be used by:

- Applicants and developers when preparing their development schemes
- Planning officers to assess the design quality of development proposals when determining applications and offering pre-application advice
- Council members when assessing development proposals

2.3 The Design Guide should be more than just a wealth of information. It needs to be an effective tool for achieving high quality design that can be used by developers and designers to prepare high quality development proposals and also by planning officers when assessing applications. It should be concise and easy to use, and should be tailored to Maldon District's particular characteristics and needs. This includes designing sites that take into account future growth whilst safeguarding and enhancing the natural and historic environment and mitigating and adapting to the potential impacts of climate change. Significant importance is placed on Place Shaping to encourage an integrated approach to development and the creation of successful places that will complement and enhance the character of the District.

2.4 The new Design Guide should:

- provide an effective tool that can be used by developers and their design teams and Council officers in the design and assessment of development proposals;
- set out clearly and briefly what the purpose of the guide is, how it is structured and how it should be used;
- set out the design process that should be followed in order to achieve high quality design – this should include the need to consider future growth planned for the area, and designing sites that deliver sustainable development;
- distinguish between best practice in rural and urban areas, where required;
- be highly visual to assist the user and inform their understanding;
- be easy to use and simple to navigate; and
- clearly signpost where the user can access more detailed guidance and when this should be taken into account.

2.5 In order for the Guide to be an effective tool it should be easy to identify the underlying national and local policy that support the Guide and give it weight in planning decisions. Consideration should also be given to how community groups could use the Guide to assist with the preparation of neighbourhood plans.

2.6 The Design Guide should also have strong links with the Building for Life 12 guidance and should encourage developers to achieve 'Built for Life' accreditation. Developers

should be able to identify from using the Guide whether their schemes would be eligible for the 'Built for Life' accreditation and recognise that by following the guide their schemes will be eligible.

- 2.7 It is intended that the Design Guide will be adopted as a Supplementary Planning Document.

3.0 Scope of Design Guide

- 3.1 Significant improvements in the quality of new development can be achieved if proposals are informed by a proper understanding of both key design principles and the character of the area in which they are situated. The Council does not want to stifle innovation but wishes to ensure that new development reflects the character of its context. The Design Guide should build on the Maldon District Characterisation Assessment (Qube, 2006) which provides essential guidance to developers on the essential characteristics of towns, villages and hamlets in the area. The Design Guide should be applicable to the whole of the district and distinguish between best practice in urban and rural areas, and reflect appropriate local characteristics and distinctiveness.
- 3.2 The District Characterisation Assessment provides a detailed assessment categorising the settlements within the District and the design forms representative of each settlement type and uses a number of case studies to identify and illustrate their defining qualities in terms of spatial form, layout, relationship to existing adjacent development and detailing. Settlements are classified according to the following settlement types:
- The Main Towns- Maldon, Heybridge and Burnham-on-Crouch
 - The Agricultural Settlements
 - The maritime/Riverside Settlements
 - The Arcadian Settlements
- 3.3 The Design Guide will be required consider design forms appropriate to each settlement type and to provide guidance on the form of development that would be appropriate in terms of overall scale, density, massing, height, landscape, layout and access. It will also be required to provide advice on the palette of materials to be used in the construction of new developments most appropriate and sympathetic to each settlement type. The main focus of the Guide should be to provide a tool that can be used to design and assess development proposals and there should be a strong and easily recognisable connection between the tool and national and local policy.
- 3.4 In preparing the Design Guide, reference should also be made to the Strategic Masterplan Frameworks (SMFs) for the South Maldon and North Heybridge Garden Suburbs. The Council is committed to the delivery of high quality, vibrant and distinctive new neighbourhoods based on garden suburb principles and the SMFs (which have been endorsed by the Council as material considerations for Development Management purposes) include design guidance for these areas. Strategic Design Codes are currently being prepared for both Garden Suburbs. The Council is also in the process of commissioning consultants to prepare a masterplan for the Central Area of Maldon and Heybridge.

3.5 The Design Guide should incorporate the following key elements:

- Review of local character and vernacular, and the policy context including national policy. This stage to be based on the Maldon District Characterisation Assessment
- Development of set of key urban design principles for creating successful places building on policies in LDP and other relevant guidance
- Development of specific district-wide guidance for the distinct areas of the district identified in the Maldon District Characterisation Study in terms of:
 - Layout
 - Scale
 - Density
 - Streetscape
 - Amenity
 - Facades
 - Materials
 - Climate change
 - Access and parking
 - Landscape design and/or greenspace
 - Householder extensions
- A design checklist that highlights criteria for assessing the design of development

3.6 The Design Guide should be user-friendly document and provide a clear design/assessment tool and relevant information necessary to inform both developers/designers and planning officers on how to deliver high quality design. It will be important that the design policies in the LDF can be easily tied to the guidance in the Design Guide. While the Design Guide will be used to determine applications, its principal focus should be to assist the design process. The Design Guide should be applicable to the whole of the district and distinguish between best practice in urban and rural areas, where relevant and necessary.

3.7 In preparing the Design Guide, the appointed consultant will be required to engage with officers and other key stakeholders.

4.0 Key Stages and Outputs

Phase 1 – Review of Baseline information

4.1 The Consultant will be required to review all existing sources of information to understand the work undertaken to date. This would include:

- Relevant National and Local planning policy guidance including LDP Policies;
- [Maldon District Characterisation Assessment \(Qube, 2006\)](#)

- Relevant supplementary planning documents within the Council's [Local Development Plan evidence base](#).
- [South Maldon Garden Suburb Strategic Masterplan Framework](#) and [North Heybridge Strategic Masterplan Framework](#) with particular regard to Character Areas and Garden Suburb Principles

4.2 In order to understand key design issues facing the District and the areas where particular guidance is required, the Consultant will be required to facilitate a workshop with officers and other key stakeholders.

4.3 In the light of this review, the consultant will advise the Council and agree the scope and content of the Design Guide.

Phase 2- Preparation of Draft Design Guide

4.4 The consultant will prepare a draft Design Guide to be expressed and presented through words and graphics including three-dimensional and section drawings and annotated photographs or sketches.

4.5 Preparation of the Draft Design Guide will include a workshop to be attended by officers and key stakeholders to test and review the draft guidance.

4.5 The consultant will present the Draft Design Guide to a meeting of the Planning & Licensing Committee.

Phase 3- Consultation on Draft Design Guide

4.6 The consultant will prepare material for public consultation and assist the Council as required in undertaking public consultation

Phase 4- Final Design Guide

4.7 The consultant will review responses to public consultation and recommend changes to the Design Guide for approval by Planning & Licensing Committee.

5.0 Submission Requirements and Assessment

5.1 In response to this brief, tenderers are required to provide:

- I. Details of proposed approach and how you propose to comply with the project brief within the defined timescale;
- II. Indicative work programme;
- III. A fixed price quotation for undertaking the work outlined in the submission including number of days for each named personnel (Phases 1-2 only) (time and expenses);
- IV. Examples of similar commissions involving the preparation of Design Guides including demonstration of subsequent outcomes;
- V. Hourly and daily fee rates for different grades of personnel - Director, Associate, Principal Consultant, Senior Consultant, Consultant for Phases 3 and 4 and any additional work which may be commissioned by the Council;

- VI. CVs of named personnel and their proposed role in the project including details of relevant experience in preparation of Design Guides;
- VII. Details of your professional liability insurance;
- VIII. Contact details of two referees.

5.2 Please confirm within your submission any conflicts of interest which should be considered in relation to other current or future work being undertaken by your company.

6.0 Budget

- 6.1 The maximum budget for undertaking Phases 1 and 2 is £30,000 (excluding VAT but inclusive of expenses).
- 6.2 Additional work may be needed to prepare detailed guidance to support the Design Guide. Any further work in Phases 3 and 4 will be commissioned on the basis of the submitted hourly rates. The maximum budget for phases 3-4 is £5,000.

7.0 Timescales

7.1 The indicative timetable for the award of the contract is as follows.

- 1) Deadline for Return of Quotation: February 2016
- 2) Interviews week commencing February 2016
- 3) Appointment of consultants: February 2016
- 4) Inception Meeting: w/c February 2016
- 5) Completion of Phase 1: March 2016
- 6) Completion of Phase 2: June 2016
- 7) Phase 3: Consultation on Draft Design Guide July/August 2016
- 8) Phase 4: Final Design Guide: October 2016

8.0 Reporting and project management arrangements

- 8.1 The consultant will work closely with the council to ensure that agreed services are being executed and delivered to the highest standards according to critical timings and best practice. The council will be able to supply OS base maps.
- 8.2 Your point of contact at the council will be Tim Parton, Spatial Planning Team Leader. You should nominate one person from your company to manage the brief through to completion and act as the primary contact.
- 8.3 The project will be administered by email and telephone wherever practicable with project meetings and workshops at the Council offices at inception and draft report stage.

9.0 Performance Indicators

- 9.1 In addition to the timescales set out in section 7 above, the Council will also require the following:

- Regular updates on the progression of the work will be provided to the Council every two weeks;
- Responses to email and telephone correspondence from the Council within two days;

10.0 Questions and further information

10.1 Please send your submission to the following contact details (submissions by email are preferred)

E mail: tim.parton@maldon.gov.uk

10.2 Postal: Tim Parton, Spatial Planning Team Leader, Maldon District Council, Council Offices, Princes Road, Maldon, Essex CM9 5DL

10.3 If you should require any further information please contact Tim Parton, Spatial Planning Team Leader, Tel: 01621 876203. Please note that, for reasons of fairness, we will send questions and their answers to the other consultants we have invited to submit a proposal.

11.0 Evaluation Methodology

The contract will be awarded taking into consideration the following criteria:

Criteria / Sub Criteria		Marks	Weightings	
Price		/10	40%	
Quality	Quality of proposed approach to meeting the requirements of the project brief set out in sections 3 and 4 above	/10	40%	60%
	Examples of previous work	/10	10%	
	Ability to meet the work programme set out in section 7 above	/10	10%	

The following scoring methodology will be used for the quality criteria;

Score	Interpretation
0 - 1	Either no answer is given or the answer provides no evidence that the Tenderer meets any of MDC's requirements.
2 - 3	The answer provides some evidence that the Tenderer meets some of MDC's requirements but only in a minimal way.
4 - 5	The answer provides satisfactory (or better) evidence that the Tenderer

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	partially meets MDC's requirements.
6 - 7	The answer provides good (or better) evidence that the Tenderer meets a majority of MDC's requirements.
8 - 9	The answer provides good (or better) evidence that the Tenderer meets nearly all of MDC's requirements.
10	The answer provides excellent evidence that the Tenderer fully meets all/exceeds MDC's requirements.

The resultant price and quality scores will be transferred across to the overall evaluation model where weightings will be applied to give total scores out of 100%.

APPENDIX 1: Quotation Form

Please complete this form and include within the submission.

General Conditions

GENERAL CONDITIONS OF CONTRACT to be observed by the Contractor in the execution of the work as detailed in the specification and all work incidental thereto for and on behalf of the Maldon District Council.

DEFINITIONS

1 For the purpose of this Contract:

(a) "Employer" shall mean the Maldon District Council, Council Offices, Princes Road, Maldon

(b) "Supervising Officer" shall mean Mr David Coleman, Planning Policy Team Leader, Maldon District Council or other such person appointed from time to time by the Employer and notified to the Contractor to act as Supervising Officer for the purpose of the Contract

(c) "The Services" means all services included within the Specification Documents which are required to be carried out in strict accordance with the terms of the Quotation, General Conditions of Contract.

MARGINAL NOTES

2. The interpretation or construction of the conditions shall not be affected by any index, marginal notes or headings.

CONTRACTOR'S OBLIGATION

3. The Contractor shall with due diligence and in good workmanlike manner execute the services to the satisfaction of the Supervising Officer

VARIATIONS

4. The Supervising Officer may, without invalidating the contract change the work or the period in which they are to be carried out. Any such instructions shall be valued by the Supervising Officer on a fair and reasonable basis.

STATUTORY OBLIGATIONS, FEES AND CHARGES

5. The Contractor shall comply with all notices required by any statute, any statutory instrument, rule or order or any regulations or bylaws applicable to the Services and charges in respect of the Services legally recoverable from him.

CONTRACTORS REPRESENTATIVE

6. The Contractor shall at all reasonable times keep a competent person in charge and inform the Supervising Officer of their name and of any change.

SUB-CONTRACTING

7. The Contractor shall not sub-contract the services or any part thereof without the written consent of the Supervising Officer which consent shall not be unreasonably withheld.

INTELLECTUAL PROPERTY RIGHTS	8. Copyright, patent rights and any other intellectual property rights and title in any material produced by the Contractor for the Authorities during this contract shall vest in the Authority unless otherwise expressly agreed or approved by the Supervising officer or an Authorities' authorised representative in writing.
PERFORMANCE	9. During the Agreement Period the Contractor will comply with its obligations under the contract and will perform the Services strictly in accordance with the provisions of the Specification and quotation documents and to the entire satisfaction of the Supervising Officer.
VALUE ADDED TAX	10. The Contractor shall include in his quotation for all incidental costs and expense he may incur under the Finance Act 1972 and regulations made thereunder to pay Value Added Tax at the standard rate on the supply of all goods and services to him by suppliers and sub-contractors, whether nominated or otherwise.
PAYMENT	<p>11. (i) The Council will pay the fixed price sum in equal instalments in line with satisfactory completion of the work within each stage.</p> <p>(ii) Fixed Day rates shall be paid one month in arrears according to the contractor submitting accurate and substantiated schedules.</p> <p>(iii) Maldon District Council shall pay the undisputed sums due to the contractor in cleared funds within 30 days of receipt and agreement of invoices for services completed to the reasonable satisfaction of the Council.</p> <p>(iv) Each invoice shall contain all appropriate references and a detailed breakdown of the services and shall be supported by any other documentation reasonably required by the Supervising Officer to substantiate the invoice.</p>

Form of Quotation & Pricing Schedule

To: Maldon District Council

I/We the undersigned, hereby offer and undertake to execute and complete the whole of the services as detailed in strict accordance with the Specification, Brief and General Conditions of Contract to the complete satisfaction of Mr David Coleman, Planning Policy Team Leader, Council Offices, Princes Road, Maldon, Essex CM9 5DL for the total amounts as follows:

Fixed price for the completion of Phases 1 and 2:

£

For phases 3 and 4 the following hourly and day rates for personnel will be applied for any additional work which may be commissioned:

Personnel	Hourly Rate (£)	Daily Rate (£)
Director		
Associate		
Principal Consultant		
Senior Consultant		
Consultant		

I/We hereby declare that:-

- (1) This is a bona fide competitive quotation and the amount has not been fixed or adjusted under or by or in accordance with any agreement or arrangement with any other person.
- (2) The amount or approximate amount of my/our proposed quotation has not been and will not be communicated to any person other than the person calling for these quotations.
- (3) I/We have not made any agreement with any other person that they shall refrain from submitting a quotation or as to the amount of any other quotation to be submitted.

I/We understand that you are not bound to accept the lowest or any quotation you may receive.

I/We understand that no increased cost of labour and/or materials will be allowed during the period of the Contract.

I/We understand that the successful quotation, together with the Council's written acceptance thereof, will form a binding Contract between the Council and the successful contractor.

Yours faithfully

Signed

For and on behalf of

Address

.....Post Code.....

Date.....